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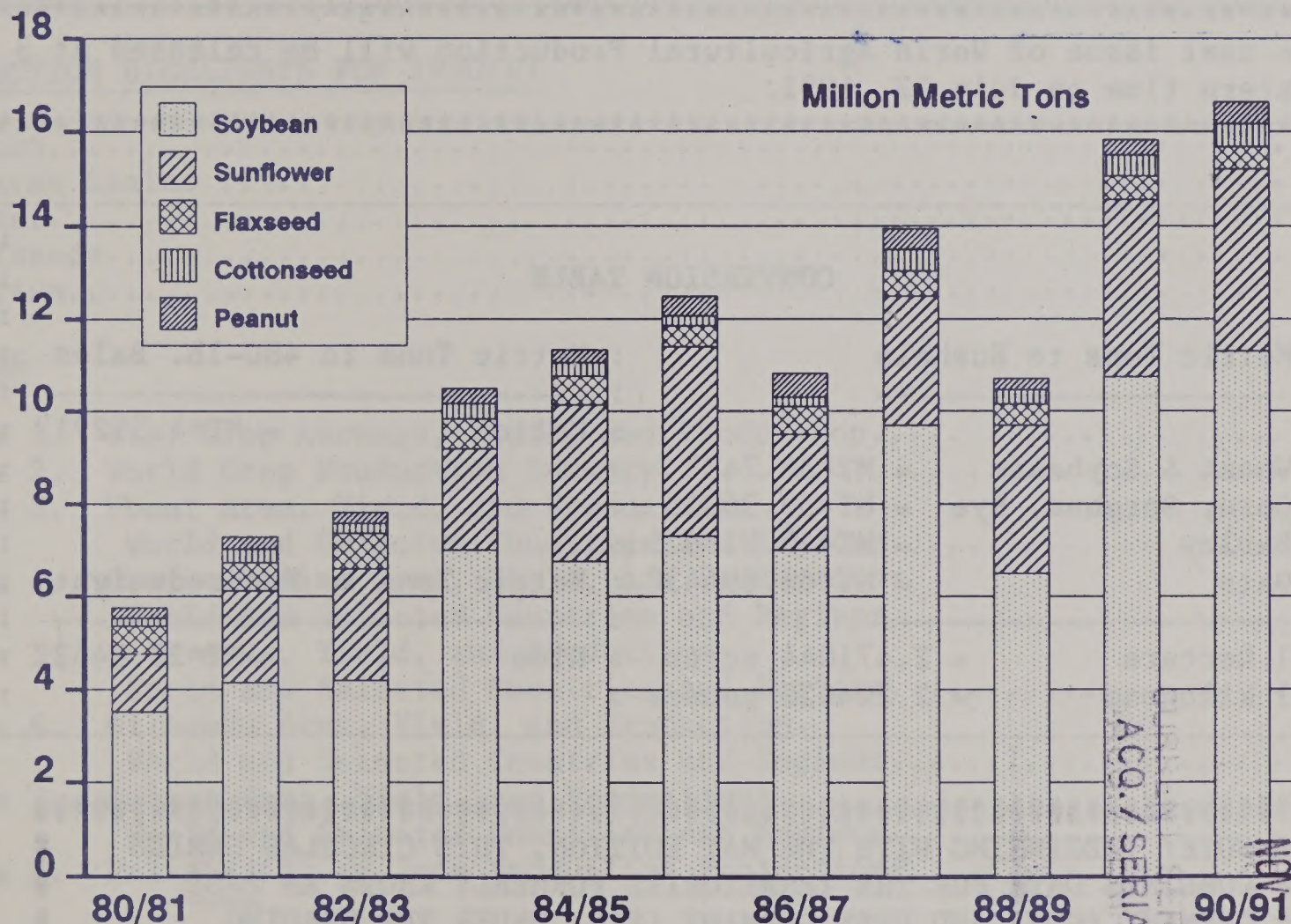
Circular Series
WAP 6-91
June 1991

World Agricultural Production

ECONOMIC RESEARCH
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JUL 8 1991

Argentine Oilseed Production



Production Articles This Month...

Argentine Oilseed
World Tobacco
World Citrus
World Coffee
Paraguay Agricultural Overview
Soviet Winter Grains Overview

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This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. Text and numbers in this report are based on unrounded data and detail may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-255), June 11, 1991.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 382-8888 or by FAX (202) 447-7729.

 * The next issue of World Agricultural Production will be released at 3 p.m. *
 * eastern time on July 12, 1991. *

:			:
:	CONVERSION TABLE		:
:			:
:	Metric Tons to Bushels	:	Metric Tons to 480-lb. Bales
:	-----	:	-----
:		:	Cotton = MT*4.592917
:	Wheat & Soybeans = MT*36.7437	:	
:	Corn, Sorghum, Rye = MT*39.36825	:	
:	Barley = MT*45.929625	:	
:	Oats = MT*68.894438	:	Metric Tons to Hundredweight
:	-----	:	-----
:	1 hectare = 2.471044 acres	:	Rice = MT*22.04622
:	1 kilogram = 2.204622 pounds	:	

 # NOTE: BEGINNING WITH THE MAY EDITION, THIS CIRCULAR SERIES #
 # COMBINES DATA FOR THE TERRITORIES FORMERLY KNOWN AS EAST #
 # GERMANY (GDR) AND WEST GERMANY (FRG) UNDER THE HEADING #
 # GERMANY. LIKEWISE, DATA FOR THE TERRITORY FORMERLY CALLED #
 # EAST GERMANY (GDR) ARE INCLUDED IN AGGREGATES FOR THE EUROPEAN #
 # COMMUNITY (EC-12) AND EXCLUDED FROM AGGREGATES FOR EASTERN #
 # EUROPE. BECAUSE OF THIS, DATA FOR "GERMANY", EASTERN EUROPE, #
 # AND THE EUROPEAN COMMUNITY (EC-12) ARE NOT COMPARABLE WITH #
 # DATA PUBLISHED IN PRIOR EDITIONS OF THIS CIRCULAR SERIES AND #
 # MAY NOT BE COMPARABLE WITH SUCH ESTIMATES FOUND IN OTHER #
 # PUBLICATIONS OF THE U.S. DEPARTMENT OF AGRICULTURE. #
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PRODUCTION HIGHLIGHTS 1991/92

June 1991

WHEAT: World production for 1991/92 is projected at 552.8 million tons, down 1.7 million, or less than 1 percent from last month's figure and down 7 percent from a year ago. Country highlights are as follows:

- o United States Production is projected at 55.1 million tons, down 1.3 million or 2 percent from last month and down 26 percent from last year. The decline is due to the reduced forecast of winter wheat, off 3 percent from last month and down 29 percent from last year.
- o EC-12 Production is projected at 88.0 million tons, down 1.0 million or about 1 percent from last month, but 4 percent above last year. The decrease is due to dry conditions and local frost damage which reduced yields in Spain.
- o Brazil Production is projected at 4.0 million tons, down 0.8 million or 17 percent from last month, but up 27 percent from 1990/91. The drop in 1991/92 wheat production is due to a decrease in expected area. Producer dissatisfaction with minimum support prices, credit, and uncertainty surrounding the privatization of the wheat subsector are the primary reasons for the reduced area.
- o Australia Production is projected at 12.0 million tons, down 0.5 million or 4 percent from last month, and down 22 percent from last year. A significant decline in wheat area is expected due to the diversion of wheat land into more remunerative alternative crops or left idle.
- o Mexico Production is projected at 3.5 million tons, down 0.3 million tons or 8 percent from last month, and down 10 percent from last year. Area has decreased by an estimated 7 percent as subsidies, especially for durum, for irrigation water have been reduced.
- o USSR Production is projected at 94 million tons, up 2.0 million or 2 percent from last month, but down 13 percent from last year. The increase from last month is due primarily to favorable growing conditions in European USSR during May and an indicated larger area.

COARSE GRAINS: World production for 1991/92 is projected at 826.1 million tons, down 4.5 million, or less than 1 percent from last month and virtually unchanged from a year ago. Country highlights are as follows:

- o USSR Production is projected at 102.5 million tons, down 2.0 million or 2 percent from last month, and down 10 percent from last years level. The decline is due mainly to a reduction in rye area and the unfavorable conditions in the New Lands.
- o EC-12 Production is projected at 88.8 million tons, down 2.0 million or 2 percent from last month, but up nearly 6 percent from last year's level. Dry conditions and local frost damage in Spain have reduced prospects for barley, oats, and sorghum. Downward area adjustments for oats and barley also reduced Germany's coarse grain estimate.
- o East Europe Production is projected at 56.8 million tons, down 0.4 million tons or less than 1 percent from last month, but up 8 percent from the 1990/91 drought-reduced harvest. The decrease is due primarily to reduced perspective production of Polish barley, mixed grains, and oats because of both lower area and reduced use of inputs.
- o United States Production is projected at 240.4 million tons, unchanged from last month, but up 4 percent from last year's level.

RICE (MILLED BASIS): World production for 1991/92 is projected at 345.9 million tons, unchanged from last month, but down 3.0 million from the 1990/91 harvest. Foreign production in 1991/92 is projected at 341.0 million tons, down 2.7 million or less than 1 percent from a year earlier. U.S. output is projected at 4.9 million tons, down 0.2 million tons from last season.

OILSEEDS: World oilseed production for 1991/92 is forecast at 223.0 million tons, unchanged from last month, but up 4.6 million or 2 percent from 1990/91. Foreign production is forecast at a record 162.5 million, up 4.6 million or 3 percent from 1990/91. U.S. oilseed production is projected at 60.5 million, essentially unchanged from 1990/91.

COTTON: World production for 1991/92 is projected at a record 91.0 million bales. This estimate is unchanged from last month, but is 5 percent more than the current season and 2 percent above the previous record 89-million-bale crop harvested in 1984/85. The U.S. production estimate remains unchanged at 16.0 million bales, 3 percent above last year and the largest crop since 1953/54 when output hit 16.4 million bales. Total foreign production is projected at 75.0 million bales, also unchanged from last month, but is a gain of nearly 5 percent over 1990/91 and second only to the 1984/85 record crop of 76.0 million bales.

Production Highlights for 1990/91

June 1991

WHEAT: World production for 1990/91 is estimated at a record 591.9 million tons, down 0.6 million, or less than 1 percent from last month's estimate. The lower figure reflects a downward revision in Argentina.

COARSE GRAINS: World production for 1990/91 is projected at 825.2 million tons, up 0.7 million or less than 1 percent from last month's estimate. The upward revision primarily reflects higher estimates for Argentine and Mexican corn production.

RICE (MILLED BASIS): World production for 1990/91 is estimated at a record 348.9 million tons, up 5.0 million or 2 percent from the 1989/90 harvest. Foreign production is estimated at 343.7 million tons, up 5.0 million or 2 percent from 1989/90. There were no significant changes from last month.

OILSEEDS: Total world oilseeds production during 1990/91 is forecast at a record 218.4 million tons, up 0.7 million tons from last month and up 3.8 million or 2 percent from 1989/90. Foreign production during 1990/91 is estimated at a record 157.9 million tons, up 0.7 million from last month and up 2.6 million or 2 percent from 1989/90. U.S. total oilseed production is estimated at 60.5 million tons, unchanged from last month, but up 1.2 million or 2 percent from 1989/90.

* **Soybeans:** World production for 1990/91 is estimated at 104.1 million tons, up 0.1 million or less than 1 percent from last month, but down 3.1 million or 3 percent from 1989/90. Total foreign soybean output is estimated at 51.8 million tons, up 0.1 million or less than 1 percent from last month, but down 3.0 million or 5 percent from 1989/90. Country highlights are as follows:

- o United States Production is estimated at 52.3 million tons, unchanged from last month, but down marginally from 1989/90.
- o Argentina Production is estimated at a record 11.3 million tons, up 0.3 million or 3 percent from last month and up 5 percent from last year. Harvest reports indicate that yields are at near-record levels.
- o Brazil Production is forecast at 15.5 million tons, down 0.5 million or 3 percent from last month and down 21 percent from last year. The decrease in estimated production is due to lower than expected area harvested in the center-west soybean growing region.
- o EC-12 Production is estimated at a record 2.2 million tons, up 0.3 million or 17 percent from last month and up 10 percent from last year's harvest. Italian harvested area was higher than previously estimated.

- * **Cottonseed:** World production for 1990/91 is forecast at 34.1 million tons, up marginally from last month and up 2.7 million or 8 percent from 1989/90. Total foreign production is estimated at 28.7 million tons, up marginally from last month and up 1.5 million or 6 percent from last year. Country highlights are as follows:
 - o **United States** Production is estimated at 5.4 million tons, unchanged from last month, but up 28 percent from 1989/90.
- * **Peanuts:** World production for 1990/91 is forecast at 21.7 million tons, up 0.2 million or less than 1 percent from last month, but down 1 percent from 1989/90. Total foreign production is estimated at 20.1 million tons, up 0.2 million or less than 1 percent from last month, but down marginally from 1989/90. Country highlights are as follows:
 - o **United States** Production is estimated at 1.6 million tons, unchanged from last month, but down 10 percent from 1989/90.
- * **Sunflowerseed:** World production for 1990/91 is forecast at 22.1 million tons, up marginally from last month and up slightly from 1989/90. Total foreign production is estimated at 21.1 million tons, up slightly from last month, but down 1 percent from last year. Country highlights are as follows:
 - o **United States** Production is estimated at 1.0 million tons, unchanged from last month, but up 29 percent from 1989/90.
- * **Rapeseed:** World production for 1990/91 is forecast at a record 25.7 million tons, up 0.4 million or 1 percent from last month and up 18 percent from 1989/90. Country highlights are as follows:
 - o **India** Production is estimated at a record 5.7 million tons, up 0.4 million or 8 percent from last month and up 38 percent from 1989/90. Rapeseed yields were at record high levels mostly because of a favorably long growing season and well distributed winter rainfall.
- * **Flaxseed:** World production for 1990/91 is forecast at 2.3 million tons, up marginally from last month and up 0.5 million or 26 percent from 1989/90. Total foreign production is pegged at 2.2 million tons, up slightly from last month and up 0.4 million or 23 percent from last year.
- * **Copra:** World production for 1990/91 is forecast at 4.9 million tons, down 57,000 tons or 1 percent from last month, but up 1 percent from 1989/1990. Copra production reached a record 5.3 million in 1985/86. There were no significant country changes this month.

- * **Palm Kernels:** World production for 1990/91 is forecast at 3.3 million tons, down marginally from last month, but up 1 percent from 1989/90. There were no significant country changes this month.
- * **Palm Oil:** World production for 1990/91 is forecast at a record 11.0 million tons, up 0.1 million or less than 1 percent from last month and up slightly from 1989/90. Country highlights are as follows:

- o **Malaysia** Production is estimated at 6.1 million tons, up 0.1 million or 2 percent from last month, but down 5 percent from 1989/90. Monthly harvest results are running higher than expected.

COTTON: World cotton production in 1990/91 is estimated at 86.7 million bales, down 0.1 million bales or less than 1 percent from last month, but up 6.6 million or 8 percent from 1989/90. Foreign production is estimated at 71.2 million bales, down 0.1 million from last month, but up 3.3 million or 5 percent from the 1989/90 estimate. Country highlights are as follows:

- o **India** Production is estimated at 9.2 million bales, down 0.2 million or 2 percent from last month and down 14 percent from last year's record crop. Cotton area was estimated slightly lower, but still remains well above last year's level. Area and yields were adversely affected this year by weather-induced problems near harvest.
- o **United States** Production is estimated at 15.5 million bales, unchanged from last month, but up 27 percent from 1989/90.

TABLE 2

World Crop Production Summary

Commodity	World	Total Foreign	North America		Europe			USSR	Asia				South America		Selected Other			All Other Countries		
			United States	Canada	Mexico	EC-12	Oth. W. Europe		Eastern Europe	China	India	Indo-nesia	Paki-stan	Thai-land	Argen-tina	Brazil	Auss-tralia		South Africa	Turkey
—Million Metric Tons—																				
<u>Wheat</u> 1989/90 1990/91 prel. 1991/92 proj. May June	537.9	482.5	55.4	24.6	4.0	82.0	4.4	40.9	92.3	90.8	54.1	0.0	14.4	0.0	10.2	5.6	14.1	2.0	12.5	15.4
	591.9	517.4	74.5	31.8	3.9	84.8	5.0	41.0	108.0	97.5	49.7	0.0	14.3	0.0	11.0	3.1	15.4	1.7	15.0	18.2
	554.5	498.2	56.4	26.1	3.8	89.0	4.1	37.9	92.0	95.0	54.0	0.0	15.0	0.0	10.0	4.8	12.5	2.4	15.5	17.3
	552.8	497.7	55.1	26.1	3.5	88.0	4.1	38.0	94.0	95.0	54.0	0.0	15.0	0.0	10.0	4.0	12.0	2.4	15.5	17.3
<u>Coarse Grains</u> 1989/90 1990/91 prel. 1991/92 proj. May June	800.4	579.1	221.4	23.5	14.1	89.6	12.4	60.7	104.8	93.5	34.6	5.0	2.7	4.3	8.3	22.5	6.9	9.5	7.5	79.1
	825.2	594.6	230.6	26.0	17.3	83.9	13.6	52.6	113.3	106.0	35.0	5.3	2.9	4.0	11.2	24.2	6.9	7.6	8.9	76.2
	830.6	590.2	240.4	23.0	16.0	90.8	12.2	57.2	104.5	99.4	33.0	5.6	2.4	4.1	10.2	26.7	7.4	8.6	9.4	79.7
	826.1	585.8	240.4	23.0	16.0	88.8	12.2	56.8	102.5	99.4	33.0	5.6	2.4	4.1	10.1	26.7	7.4	8.6	9.4	79.8
<u>Rice (Milled)</u> 1989/90 1990/91 1991/92 May June	343.9	338.7	5.1	0.0	0.4	1.4	0.0	0.2	1.7	126.1	74.1	29.1	3.2	13.3	0.2	4.9	0.7	0.0	0.2	23.2
	348.9	343.7	5.1	0.0	0.2	1.6	0.0	0.2	1.6	129.5	75.0	29.2	3.1	11.4	0.2	6.7	0.5	0.0	0.2	23.9
	345.9	341.0	4.9																	
	345.9	341.0	4.9																	
<u>Total Grains 1/</u> 1989/90 1990/91 prel. 1991/92 proj. May June	1,682.2	1,400.3	281.9	48.0	18.5	173.0	16.8	101.8	198.8	310.4	162.7	34.1	20.4	17.6	18.7	33.0	21.7	11.5	20.2	193.3
	1,766.0	1,455.8	310.2	57.8	21.4	170.3	18.6	93.8	222.9	333.0	159.6	34.5	20.3	15.4	22.5	34.0	22.9	9.3	24.1	195.6
	1,731.0	1,429.4	301.6																	
	1,724.8	1,424.5	300.4																	
<u>Oilseeds 2/</u> 1988/89 1989/90 prel. 1990/91 proj. May June	204.0	153.7	50.3	5.9	1.0	11.9	0.6	4.7	13.4	30.6	19.4	2.0	3.2	0.8	10.7	24.6	0.8	0.8	2.3	21.0
	214.5	155.3	59.2	4.9	1.4	11.5	0.7	5.5	14.2	28.5	19.3	2.0	3.3	0.9	15.8	21.8	2.4	1.0	2.3	19.8
	217.7	157.2	60.5	5.7	1.0	12.7	0.7	4.8	13.5	33.1	20.1	2.1	3.6	0.7	16.3	17.5	1.0	0.9	2.0	21.4
	218.4	157.9	60.5	5.7	1.0	13.0	0.7	4.8	13.5	33.1	20.4	2.1	3.6	0.7	16.6	17.0	1.0	1.0	2.0	21.6
—Million 480-Pound Bales—																				
<u>Cotton</u> 1988/89 1989/90 prel. 1990/91 proj. May June	84.9	69.5	15.4	0.0	1.4	1.6	0.0	0.1	12.7	19.1	8.5	0.0	6.5	0.2	0.9	3.4	1.3	0.4	3.0	10.4
	80.1	67.9	12.2	0.0	0.8	1.5	0.0	0.1	12.3	17.4	10.7	0.0	6.7	0.1	1.3	3.0	1.4	0.3	2.8	9.5
	86.8	71.3	15.5	0.0	0.8	1.5	0.0	0.1	12.0	20.5	9.4	0.0	7.5	0.1	1.4	3.2	1.8	0.2	3.0	10.0
	86.7	71.2	15.5	0.0	0.8	1.5	0.0	0.1	12.0	20.5	9.2	0.0	7.5	0.1	1.3	3.2	1.8	0.2	3.0	10.1

1/ Includes total of wheat, coarse grains, and rice (milled) shown above. Estimates of Soviet total grain production, including wheat, coarse grains, rice (rough), minor grains and pulses are 210.9 million tons in 1989/90, 235.0 million in 1990/91, and 210.0 million forecast in 1991/92.

2/ Totals for major regions and countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also include copra and palm kernels for all countries. Note: Entries of 0.0 indicate no reported or insignificant production.

TABLE 3

Wheat Area, Yield, and Production World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1991/92 May	Proj. June		Prel. 1989/90	1991/92 May	Proj. June	
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	225.5	230.8		2.39	2.57			537.9	591.9	554.5	552.8
United States	25.2	28.1		2.20	2.66			55.4	74.5	56.4	55.1
Total Foreign	200.3	202.7	200.5	2.41	2.55	2.47	2.48	482.5	517.4	498.2	497.7
Maj. Foreign Exporters	45.0	45.7	44.3	2.91	3.13	3.06	3.07	130.9	143.0	137.6	136.1
Argentina	5.5	5.9	5.3	1.86	1.86	1.89	1.89	10.2	11.0	10.0	10.0
Australia	8.9	9.2	8.0	1.58	1.67	1.44	1.50	14.1	15.4	12.5	12.0
Canada	13.6	14.1	14.0	1.80	2.26	1.86	1.86	24.6	31.8	26.1	26.1
EC-12	17.0	16.5	17.0	4.83	5.15	5.26	5.19	82.0	84.8	89.0	88.0
Major Importers	96.4	97.3	95.7	2.48	2.68	2.53	2.54	239.0	260.5	242.1	243.5
Brazil	3.4	2.7	2.6	1.65	1.16	1.50	1.54	5.6	3.1	4.8	4.0
China	29.8	30.3	30.5	3.04	3.22	3.11	3.11	90.8	97.5	95.0	95.0
Eastern Europe	9.9	10.0	9.9	4.14	4.11	3.83	3.86	40.9	41.0	37.9	38.0
Egypt	0.6	0.7	0.8	5.05	5.79	6.40	6.40	3.2	4.3	4.8	4.8
Other N. Africa 1/	4.7	5.1	5.3	1.13	1.11	1.28	1.28	5.3	5.6	6.8	6.8
Japan	0.3	0.3	0.3	3.47	3.66	3.46	3.46	1.0	1.0	0.9	0.9
USSR	47.7	48.2	46.5	1.94	2.24	2.00	2.02	92.3	108.0	92.0	94.0
Other Foreign	58.9	59.8	60.5	1.91	1.91	1.95	1.95	112.6	113.9	118.4	118.2
India	24.1	23.5	24.3	2.24	2.12	2.22	2.22	54.1	49.7	54.0	54.0
Iran	6.0	6.1	6.2	0.97	1.00	1.03	1.03	5.8	6.1	6.4	6.4
Mexico	1.0	1.0	0.9	4.21	4.11	4.00	3.98	4.0	3.9	3.8	3.5
Non-EC W. Europe	0.8	0.9	0.8	5.19	5.40	5.01	5.01	4.4	5.0	4.1	4.1
Pakistan	7.7	7.8	8.0	1.87	1.82	1.89	1.89	14.4	14.3	15.0	15.0
South Africa	1.8	1.7	1.9	1.11	1.00	1.26	1.26	2.0	1.7	2.4	2.4
Turkey	8.7	8.8	8.8	1.44	1.71	1.76	1.76	12.5	15.0	15.5	15.5
Others	8.7	10.0	9.7	1.76	1.82	1.78	1.78	15.4	18.2	17.3	17.3

1/ Algeria, Libya, Morocco, and Tunisia.

JUNE 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 4
Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. May June		1989/90	Prel. 1990/91	1991/92 Proj. May June	
TOTAL COARSE GRAINS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World 1/	321.0	318.3		2.49	2.59			800.4	825.2	830.6	826.1
United States	37.0	36.4		5.98	6.34			221.4	230.6	240.4	240.4
Total Foreign	284.0	281.9	283.3	2.04	2.11	2.08	2.07	579.1	594.6	590.2	585.8
Maj. Foreign Exporters	21.4	20.9	21.4	2.46	2.66	2.47	2.47	52.5	55.7	53.2	53.1
Argentina	3.2	3.3	3.5	2.64	3.43	2.82	2.88	8.3	11.2	10.2	10.1
Australia	4.0	4.3	4.8	1.71	1.63	1.53	1.53	6.9	6.9	7.4	7.4
Canada	8.3	8.0	7.5	2.84	3.24	3.07	3.07	23.5	26.0	23.0	23.0
South Africa	4.4	3.8	4.2	2.18	1.97	2.07	2.07	9.5	7.6	8.6	8.6
Thailand	1.6	1.5	1.5	2.78	2.58	2.72	2.72	4.3	4.0	4.1	4.1
Major Importers	103.7	99.8	101.3	2.73	2.83	2.77	2.74	283.3	282.1	282.3	277.9
Eastern Europe	16.4	15.9	16.1	3.70	3.30	3.52	3.52	60.7	52.6	57.2	56.8
EC-12	20.2	19.2	19.2	4.43	4.37	4.74	4.61	89.6	83.9	90.8	88.8
Other W. Europe	3.1	3.0	3.0	3.97	4.46	4.10	4.10	12.4	13.6	12.2	12.2
Mexico	7.5	8.2	8.5	1.88	2.09	1.88	1.88	14.1	17.3	16.0	16.0
USSR	56.0	52.9	54.0	1.87	2.14	1.92	1.90	104.8	113.3	104.5	102.5
Other Major Import. 2/	0.4	0.4	0.4	3.83	3.63	3.70	3.70	1.6	1.5	1.5	1.5
Other Foreign	159.0	161.3	160.5	1.53	1.59	1.58	1.59	243.3	256.9	254.7	254.8
Brazil	12.5	13.5	13.5	1.79	1.79	1.98	1.98	22.5	24.2	26.7	26.7
China	28.2	28.7	28.3	3.31	3.69	3.52	3.52	93.5	106.0	99.4	99.4
India	37.7	38.9	37.8	0.92	0.90	0.87	0.87	34.6	35.0	33.0	33.0
Indonesia	2.7	2.9	3.1	1.85	1.83	1.84	1.84	5.0	5.3	5.6	5.6
Nigeria	9.9	9.5	9.9	0.82	0.67	0.84	0.84	8.1	6.3	8.3	8.3
Philippines	3.6	3.8	3.9	1.24	1.24	1.24	1.24	4.5	4.7	4.9	4.9
Turkey	4.4	4.5	4.5	1.70	1.99	2.11	2.11	7.5	8.9	9.4	9.4
Others	59.8	59.5	59.7	1.13	1.12	1.13	1.13	67.6	66.5	67.5	67.6
BARLEY											
World	74.8	73.3		2.27	2.54			169.8	185.8	177.3	174.0
United States	3.4	3.0		2.62	3.00			8.8	9.1	9.3	9.3
Total Foreign	71.4	70.2	72.1	2.25	2.52	2.33	2.29	161.0	176.7	168.0	164.7
Australia	2.4	2.5	2.9	1.73	1.65	1.50	1.50	4.1	4.2	4.4	4.4
Canada	4.7	4.6	4.3	2.50	2.93	2.73	2.73	11.7	13.5	11.8	11.8
China	3.3	3.3	3.3	1.74	1.73	1.73	1.73	5.7	5.7	5.7	5.7
Eastern Europe	3.6	3.6	3.5	4.05	4.07	3.75	3.75	14.6	14.8	13.3	13.2
EC-12	12.6	12.3	12.0	4.05	4.13	4.32	4.13	51.0	50.8	51.8	49.6
Other W. Europe	1.5	1.5	1.5	3.87	4.31	3.91	3.91	5.9	6.3	5.9	5.9
Turkey	3.4	3.4	3.4	1.46	1.76	1.91	1.91	4.9	6.0	6.5	6.5
USSR	27.6	26.1	28.5	1.75	2.34	1.89	1.86	48.5	61.0	54.0	53.0
Others	12.4	12.9	12.6	1.18	1.11	1.17	1.16	14.6	14.4	14.7	14.7

FOOTNOTES AT END OF TABLE

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TABLE 4
Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1990/91	1991/92 May	1991/92 June	Prel. 1989/90	1990/91	1991/92 May	1991/92 June
<u>CORN</u>	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	126.1	126.7		3.66	3.70			461.2	469.2	492.2	492.1
United States	26.2	27.1		7.30	7.44			191.2	201.5	210.2	210.2
Total Foreign	99.9	99.6	102.9	2.70	2.69	2.74	2.74	270.0	267.7	282.0	281.9
Maj. Foreign Exporters	6.7	6.4	6.9	2.72	2.89	2.75	2.75	18.2	18.5	19.0	19.0
Argentina	1.7	2.0	2.2	3.06	4.00	3.27	3.27	5.2	7.8	7.2	7.2
South Africa	3.6	3.1	3.4	2.47	2.26	2.35	2.35	8.9	7.0	8.0	8.0
Thailand	1.4	1.4	1.3	2.93	2.74	2.88	2.88	4.1	3.7	3.8	3.8
Major Importers	21.2	19.7	22.3	3.95	3.44	3.80	3.80	83.8	67.8	84.6	84.5
Eastern Europe	7.1	6.5	6.9	4.21	3.24	4.00	4.00	29.7	21.1	27.8	27.8
EC-12	3.9	3.5	4.0	6.91	6.23	7.08	7.06	26.9	21.6	28.1	28.1
Other W. Europe	0.2	0.2	0.2	7.68	7.91	7.88	7.88	1.7	1.8	1.7	1.7
Mexico	5.8	6.6	7.0	1.68	1.97	1.71	1.71	9.8	13.0	12.0	12.0
USSR	4.1	2.8	4.0	3.71	3.50	3.63	3.63	15.3	9.8	14.5	14.5
Other Maj. Import. 2/	0.1	0.1	0.1	4.28	4.10	4.18	4.18	0.5	0.5	0.5	0.5
Other Foreign	72.0	73.5	73.7	2.33	2.47	2.42	2.42	168.0	181.4	178.4	178.4
Brazil	12.1	13.0	13.0	1.80	1.81	2.00	2.00	21.8	23.5	26.0	26.0
Canada	1.0	1.0	1.1	6.36	7.00	6.00	6.00	6.4	7.0	6.6	6.6
China	20.4	21.0	20.6	3.88	4.29	4.08	4.08	78.9	90.0	84.0	84.0
Egypt	0.8	0.8	0.9	5.37	5.43	5.59	5.59	4.5	4.6	4.8	4.8
India	5.9	5.9	5.9	1.61	1.61	1.53	1.53	9.4	9.5	9.0	9.0
Indonesia	2.7	2.9	3.1	1.85	1.83	1.84	1.84	5.0	5.3	5.6	5.6
Philippines	3.6	3.8	3.9	1.24	1.24	1.24	1.24	4.5	4.7	4.9	4.9
Zimbabwe	1.2	1.1	1.2	1.69	1.52	1.67	1.67	1.9	1.6	2.0	2.0
Others	24.4	24.0	24.1	1.46	1.47	1.47	1.47	35.5	35.2	35.6	35.6
<u>SORGHUM</u>											
World	40.6	39.6		1.35	1.34			54.8	53.2	54.6	54.6
United States	4.5	3.7		3.48	3.95			15.6	14.5	16.3	16.3
Total Foreign	36.1	35.9	36.0	1.08	1.08	1.07	1.07	39.1	38.7	38.3	38.3
Argentina	0.7	0.7	0.7	2.86	3.57	2.86	2.86	2.0	2.5	2.0	2.0
Australia	0.4	0.5	0.5	2.27	1.95	2.00	2.00	0.9	0.9	1.0	1.0
China	1.6	1.6	1.6	2.72	3.35	3.17	3.17	4.4	5.2	5.0	5.0
India	14.9	15.0	15.0	0.86	0.83	0.80	0.80	12.9	12.5	12.0	12.0
Mexico	1.3	1.3	1.2	2.88	2.85	2.92	2.92	3.8	3.7	3.5	3.5
Nigeria	4.4	4.4	4.4	0.80	0.64	0.80	0.80	3.5	2.8	3.5	3.5
South Africa	0.2	0.2	0.2	1.11	1.08	1.11	1.11	0.3	0.2	0.3	0.3
Sudan	3.1	3.0	3.0	0.52	0.50	0.50	0.50	1.6	1.5	1.5	1.5
Thailand	0.2	0.2	0.2	1.44	1.39	1.47	1.47	0.2	0.3	0.3	0.3
Others	9.2	9.1	9.2	1.04	1.00	1.02	1.01	9.5	9.1	9.3	9.3

FOOTNOTES AT END OF TABLE

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TABLE 4
Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1991/92 Proj. 1990/91	May	June	Prel. 1989/90	1991/92 Proj. 1990/91	May	June
<u>OATS</u>	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	22.7	21.5		1.84	1.98			41.8	42.6	40.7	40.2
United States	2.8	2.4		1.95	2.16			5.4	5.2	4.4	4.4
Total Foreign	19.9	19.1	19.0	1.83	1.96	1.89	1.88	36.4	37.4	36.3	35.9
USSR	10.8	10.7	10.5	1.57	1.68	1.62	1.62	16.8	18.0	17.0	17.0
Maj. Foreign Exporters	3.7	3.3	3.4	1.97	2.15	1.99	2.01	7.3	7.2	7.0	6.9
Argentina	0.4	0.3	0.4	1.44	1.34	1.33	1.29	0.6	0.4	0.6	0.5
Australia	1.1	1.2	1.3	1.44	1.42	1.38	1.38	1.6	1.6	1.8	1.8
Canada	1.7	1.5	1.4	2.08	2.33	2.22	2.22	3.5	3.5	3.0	3.0
Sweden	0.4	0.4	0.4	3.54	4.51	3.86	3.86	1.5	1.6	1.6	1.6
Other Foreign	5.5	5.0	5.1	2.25	2.43	2.36	2.34	12.3	12.3	12.3	12.0
China	0.6	0.6	0.6	1.20	1.21	1.18	1.18	0.7	0.7	0.7	0.7
Eastern Europe	1.2	1.1	1.1	2.59	2.78	2.62	2.64	3.1	3.2	3.0	2.9
Czechoslovakia	0.1	0.1	0.1	3.24	4.55	4.00	4.00	0.3	0.4	0.4	0.4
Poland	0.8	0.7	0.7	2.72	2.84	2.67	2.70	2.2	2.1	2.0	1.9
EC-12	1.9	1.5	1.7	2.82	3.15	3.14	3.07	5.2	4.8	5.4	5.2
France	0.3	0.2	0.2	3.73	3.86	3.81	3.81	1.0	0.9	0.8	0.8
Germany	0.7	0.5	0.6	3.68	4.45	4.62	4.48	2.4	2.1	2.7	2.6
Finland	0.4	0.5	0.4	3.24	3.67	3.28	3.28	1.4	1.7	1.3	1.3
Norway	0.1	0.1	0.1	3.13	4.58	4.00	4.00	0.4	0.6	0.5	0.5
Others	1.3	1.2	1.2	1.12	1.09	1.11	1.11	1.4	1.4	1.4	1.4
<u>RYE</u>											
World	16.9	16.7		2.22	2.32			37.6	38.9	31.2	30.5
United States	0.2	0.2		1.77	1.70			0.3	0.3	0.3	0.3
Total Foreign	16.7	16.6	13.4	2.23	2.33	2.23	2.25	37.3	38.6	30.9	30.2
USSR	10.7	10.4	8.0	1.87	2.02	1.82	1.81	20.1	21.0	15.5	14.5
Maj. Foreign Exporter											
Canada	0.5	0.5	0.4	1.74	1.74	1.71	1.71	0.9	0.9	0.6	0.6
Other Foreign											
Eastern Europe	3.3	3.4	3.4	2.93	2.87	2.82	2.84	9.7	9.9	9.5	9.6
Hungary	0.1	0.1	0.1	2.06	2.46	2.22	2.22	0.2	0.2	0.2	0.2
Poland	2.9	3.1	3.0	2.95	2.86	2.83	2.85	8.6	8.8	8.5	8.6
Czechoslovakia	0.2	0.2	0.2	4.05	4.26	3.82	3.82	0.7	0.7	0.7	0.7
EC-12	1.6	1.6	1.2	3.33	3.35	3.64	3.69	5.3	5.3	4.3	4.5
Denmark	0.1	0.1	0.1	4.82	4.95	4.84	4.84	0.5	0.5	0.5	0.5
Germany	1.0	1.1	0.7	3.86	3.78	4.76	4.71	3.9	4.0	3.0	3.3
Others	0.6	0.6	0.5	2.29	2.39	2.11	2.17	1.3	1.5	1.0	1.0

1/ Total of barley, corn, sorghum, oats, and rye shown below, plus millet and mixed grain.

2/ Japan, Republic of Korea, and Taiwan.

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TABLE 5

Rice Area, Yield, and Production World and Selected Countries and Regions

	AREA		YIELD			PRODUCTION (Rough Basis)			MILLING RATE			PRODUCTION (Milled Basis)		
	Prel. 1989/90	Proj. 1991/92	Prel. 1989/90	Prel. 1990/91	1991/92 Proj. May June	Prel. 1989/90	Prel. 1990/91	1991/92 Proj. May June	Prel. 1989/90	Prel. 1990/91	1991/92 Proj. May June	Prel. 1989/90	Prel. 1990/91	1991/92 Proj. May June
	—Million Hectares—		—Metric Tons Per Hectare—			—Million Metric Tons—			—In Percent—			—Million Metric Tons—		
World	146.5	146.9	3.5	3.5		507.8	515.1	512.2	67.7	67.7	67.7	343.9	348.9	345.9
United States	1.1	1.1	6.4	6.2		7.0	7.0	7.0	73.0	73.0	70.0	5.1	5.1	4.9
Total Foreign	145.4	145.7	3.4	3.5	3.5	500.8	508.0	505.2	67.6	67.7	67.5	338.7	343.7	341.0
Maj. Foreign Exporters	16.8	16.5	2.3	2.2		38.5	35.7		64.0	63.8		24.6	22.8	
Burma	4.7	4.8	2.9	2.9		13.5	13.7		60.0	60.0		8.1	8.2	
Pakistan	2.1	2.0	2.3	2.3		4.8	4.7		66.7	66.7		3.2	3.1	
Thailand	10.0	9.7	2.0	1.8		20.2	17.3		66.0	66.0		13.3	11.4	
Major Importers	13.8	13.7	4.2	4.3		58.3	58.4		66.1	66.0		38.5	38.6	
EC-12	0.3	0.4	6.2	6.4		2.1	2.4		67.0	67.4		1.4	1.6	
Indonesia	10.5	10.3	4.2	4.4		44.7	45.0		65.0	65.0		29.1	29.2	
Nigeria	0.6	0.7	1.4	1.4		0.9	0.9		60.0	60.0		0.5	0.6	
Republic of Korea	1.3	1.2	6.4	6.2		8.1	7.7		72.8	72.6		5.9	5.6	
Other Maj. Import. 1/	1.0	1.1	2.4	2.3		2.5	2.5		65.5	65.5		1.6	1.6	
Other Foreign	114.8	115.6	3.5	3.6		404.1	413.9		68.2	68.2		275.6	282.3	
Australia	0.1	0.1	8.0	8.6		0.9	0.8		71.5	71.5		0.7	0.5	
Bangladesh	10.5	10.6	2.6	2.5		26.8	26.7		66.7	66.7		17.9	17.8	
Brazil	4.3	4.8	1.7	2.0		7.2	9.8		68.0	68.0		4.9	6.7	
China	32.7	32.7	5.5	5.7		180.1	185.0		70.0	70.0		126.1	129.5	
India	42.2	42.2	2.6	2.7		111.1	112.5		66.7	66.7		74.1	75.0	
Japan	2.1	2.1	6.2	6.3		12.9	13.1		72.8	72.8		9.4	9.6	
Philippines	3.4	3.5	2.6	2.7		8.9	9.4		65.0	65.0		5.8	6.1	
USSR	0.7	0.6	3.9	4.0		2.6	2.4		65.0	65.0		1.7	1.6	
Vietnam	5.9	5.9	3.1	3.1		18.4	18.0		65.0	65.0		12.0	11.7	
Others	12.9	13.2	2.7	2.7		35.1	36.2		66.1	66.1		23.2	23.9	

1/ Hong Kong, Iran, Iraq, Ivory Coast, and Saudi Arabia.

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TABLE 6
Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel.		Proj.	Prel.		1990/91 Proj.		Prel.		1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	May	June	1988/89	1989/90	May	June
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
<u>SOYBEANS</u>											
World	55.87	58.05	54.30	1.71	1.85	1.91	1.92	95.55	107.19	104.06	104.13
United States	23.22	24.09	22.87	1.82	2.17	2.29	2.29	42.15	52.35	52.30	52.30
Total Foreign	32.65	33.96	31.44	1.64	1.61	1.63	1.65	53.40	54.84	51.76	51.82
Maj. Foreign Exporters	16.17	16.35	14.45	1.84	1.90	1.84	1.85	29.70	31.09	27.00	26.80
Argentina	4.00	4.95	4.80	1.63	2.17	2.29	2.35	6.50	10.75	11.00	11.30
Brazil	12.17	11.40	9.65	1.91	1.78	1.62	1.61	23.20	20.34	16.00	15.50
Other Foreign	16.48	17.61	16.99	1.44	1.35	1.46	1.47	23.70	23.75	24.76	25.02
Canada	0.53	0.54	0.50	2.16	2.26	2.63	2.63	1.15	1.22	1.33	1.33
China	8.12	8.06	7.50	1.43	1.27	1.52	1.52	11.65	10.23	11.40	11.40
Eastern Europe	0.56	0.54	0.54	1.20	1.51	1.31	1.33	0.67	0.82	0.71	0.72
EC-12	0.53	0.63	0.69	3.10	3.11	2.82	3.12	1.66	1.97	1.85	2.16
India	1.73	2.13	2.30	0.89	0.80	1.04	1.04	1.55	1.72	2.40	2.40
Indonesia	1.18	1.15	1.25	1.02	0.96	0.96	0.96	1.20	1.10	1.20	1.20
Paraguay	0.85	0.98	0.89	1.90	1.61	1.46	1.46	1.62	1.58	1.30	1.30
USSR	0.76	0.83	0.84	1.16	1.15	1.10	1.05	0.88	0.96	0.92	0.88
Others	2.21	2.74	2.47	1.51	1.52	1.46	1.47	3.33	4.17	3.65	3.63
<u>COTTONSEED</u>											
World	33.73	32.32	33.80	0.99	0.97	1.00	1.01	33.23	31.41	34.07	34.08
United States	4.84	3.86	4.75	1.14	1.10	1.14	1.14	5.50	4.24	5.41	5.41
Total Foreign	28.89	28.46	29.06	0.96	0.95	0.98	0.99	27.73	27.17	28.66	28.67
China	5.53	5.20	5.53	1.27	1.24	1.37	1.37	7.05	6.44	7.60	7.60
India	7.34	7.33	7.60	0.51	0.60	0.53	0.53	3.71	4.40	4.07	4.00
Pakistan	2.51	2.60	2.69	1.14	1.12	1.21	1.21	2.85	2.91	3.27	3.26
USSR	3.43	3.34	3.15	1.65	1.67	1.71	1.71	5.65	5.57	5.40	5.40
Others	10.08	9.99	10.08	0.84	0.79	0.82	0.83	8.46	7.85	8.32	8.40
<u>PEANUTS</u>											
World	19.93	19.82	19.52	1.17	1.11	1.11	1.11	23.28	22.06	21.56	21.74
United States	0.66	0.67	0.73	2.74	2.72	2.23	2.23	1.81	1.81	1.63	1.63
Total Foreign	19.27	19.16	18.79	1.11	1.06	1.07	1.07	21.47	20.25	19.93	20.11
Argentina	0.15	0.18	0.20	1.62	1.87	2.37	2.37	0.24	0.34	0.48	0.48
China	2.91	2.96	2.96	1.95	1.81	2.03	2.03	5.69	5.37	6.00	6.00
India	8.53	8.71	8.10	1.06	0.93	0.90	0.90	9.00	8.09	7.30	7.30
Senegal	0.90	0.78	0.92	0.76	1.04	0.73	0.73	0.69	0.82	0.67	0.67
South Africa	0.15	0.09	0.09	1.07	1.28	1.05	1.59	0.16	0.11	0.09	0.14
Sudan	0.58	0.55	0.54	0.78	0.73	0.60	0.60	0.45	0.40	0.33	0.33
Others	6.05	5.89	5.99	0.87	0.87	0.87	0.87	5.23	5.13	5.07	5.20

TABLE 6
Oilseeds Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel.		Proj.	Prel.		1990/91 Proj.		Prel.		1990/91 Proj.	
	1988/89	1989/90	1990/91	1988/89	1989/90	May	June	1988/89	1989/90	May	June
<u>SUNFLOWERSEED</u>	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	14.96	15.91	15.96	1.36	1.38	1.39	1.38	20.36	22.00	22.04	22.09
United States	0.78	0.72	0.75	1.05	1.10	1.38	1.38	0.81	0.80	1.03	1.03
Total Foreign	14.18	15.19	15.21	1.38	1.40	1.39	1.38	19.55	21.20	21.01	21.06
Argentina	2.20	2.80	2.30	1.45	1.36	1.70	1.70	3.20	3.80	3.90	3.90
China	0.83	0.72	0.70	1.42	1.49	1.71	1.71	1.18	1.06	1.20	1.20
EC-12	2.16	2.12	2.53	1.84	1.66	1.61	1.61	3.99	3.53	4.05	4.06
East Europe	1.31	1.29	1.29	1.62	1.87	1.68	1.70	2.13	2.42	2.18	2.20
USSR	4.28	4.46	4.67	1.45	1.59	1.41	1.41	6.20	7.07	6.50	6.56
Others	3.40	3.80	3.73	0.84	0.87	0.86	0.84	2.86	3.32	3.18	3.15
<u>RAPESEED</u>											
World	17.88	17.13	18.18	1.27	1.28	1.37	1.42	22.70	21.86	25.36	25.73
Total Foreign	17.88	17.13	18.18	1.27	1.28	1.37	1.42	22.70	21.86	25.36	25.73
Canada	3.67	2.90	2.63	1.17	1.07	1.26	1.26	4.31	3.10	3.33	3.33
China	4.94	4.99	5.49	1.02	1.09	1.26	1.26	5.04	5.44	6.93	6.93
EC-12	1.99	1.81	2.12	2.82	2.96	2.91	2.91	5.59	5.36	6.16	6.17
East Europe	0.73	0.85	0.79	2.43	2.58	2.28	2.28	1.77	2.19	1.81	1.81
India	4.83	4.99	5.60	0.91	0.83	0.95	1.02	4.38	4.12	5.30	5.70
Others	1.72	1.59	1.54	0.93	1.04	1.00	1.16	1.60	1.65	1.84	1.78
<u>FLAXSEED</u>											
World	3.70	3.74	3.82	0.45	0.49	0.62	0.61	1.67	1.85	2.32	2.34
United States	0.09	0.07	0.10	0.45	0.47	0.95	0.95	0.04	0.03	0.10	0.10
Total Foreign	3.61	3.67	3.72	0.45	0.49	0.61	0.60	1.63	1.82	2.22	2.24
Argentina	0.54	0.58	0.58	0.86	0.90	0.83	0.83	0.46	0.52	0.48	0.48
Canada	0.50	0.60	0.73	0.74	0.83	1.29	1.29	0.37	0.50	0.94	0.94
India	1.20	1.18	1.20	0.30	0.29	0.33	0.33	0.36	0.34	0.40	0.40
USSR	1.04	0.97	0.85	0.21	0.24	0.21	0.19	0.22	0.23	0.17	0.16
Others	0.33	0.36	0.37	0.66	0.66	0.68	0.72	0.22	0.23	0.24	0.26
<u>MAJOR OILSEEDS</u>	146.06	146.98	145.59	1.35	1.40	1.43	1.44	196.79	206.36	209.41	210.10
United States	29.58	29.41	29.20	1.70	2.01	2.07	2.07	50.31	59.24	60.48	60.48
Total Foreign	116.48	117.57	116.39	1.26	1.25	1.28	1.29	146.48	147.13	148.93	149.62
<u>COPRA</u>	--	--	--	--	--	--	--	4.28	4.84	4.96	4.91
<u>PALM KERNEL</u>	--	--	--	--	--	--	--	2.94	3.34	3.29	3.35
<u>TOTAL OILSEEDS</u>	--	--	--	--	--	--	--	204.01	214.53	217.67	218.35
<u>PALM OIL 1/</u>	--	--	--	--	--	--	--	9.56	10.91	10.90	10.99

1/ Not included in total oilseeds.

TABLE 7

Cotton Area, Yield, and Production **World and Selected Countries and Regions**

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1988/89	Proj. 1989/90	Proj. 1990/91	Prel. 1988/89	1990/91 Proj. 1989/90 May	1990/91 Proj. Jun.		Prel. 1988/89	1990/91 Proj. 1989/90 May	1990/91 Proj. Jun.	
	---Million Hectares---			---Kilograms Per Hectare---				---Million 480-Pound Bales---			
World	33.7	31.5	33.4	549	553	564	565	84.9	80.1	86.8	86.7
United States	4.8	3.9	4.7	694	688	711	711	15.4	12.2	15.5	15.5
Total Foreign	28.9	27.7	28.7	524	534	540	541	69.5	67.9	71.3	71.2
Maj. Foreign Exporters	13.5	13.1	13.2	749	727	786	786	46.5	43.7	47.7	47.7
Australia	0.2	0.2	0.3	1,475	1,326	1411	1,411	1.3	1.4	1.8	1.8
Central America 1/	0.1	0.1	0.1	830	834	807	814	0.4	0.3	0.3	0.3
China	5.5	5.2	5.5	751	728	807	807	19.1	17.4	20.5	20.5
Egypt	0.4	0.4	0.4	718	683	719	719	1.4	1.3	1.4	1.4
Mexico	0.3	0.2	0.2	1,209	891	913	913	1.4	0.8	0.8	0.8
Pakistan	2.5	2.6	2.7	568	560	606	606	6.5	6.7	7.5	7.5
Sudan	0.3	0.3	0.2	443	456	499	499	0.6	0.6	0.4	0.4
Turkey	0.7	0.7	0.7	882	851	976	976	3.0	2.8	3.0	3.0
USSR	3.4	3.3	3.2	805	805	827	827	12.7	12.3	12.0	12.0
Major Importers 2/	0.4	0.4	0.4	837	889	853	853	1.7	1.5	1.5	1.5
Other Foreign	14.9	14.2	15.1	311	347	318	318	21.4	22.7	22.1	22.0
Argentina	0.5	0.6	0.6	389	486	459	449	0.9	1.3	1.4	1.3
Brazil	2.4	1.9	2.1	311	347	332	332	3.4	3.0	3.2	3.2
India	7.3	7.3	7.6	253	317	264	264	8.5	10.7	9.4	9.2
Syria	0.2	0.2	0.2	667	930	977	977	0.5	0.7	0.7	0.7
Others	4.6	4.3	4.6	385	358	359	360	8.0	7.0	7.5	7.6

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

JUNE 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 8

The table below presents a 10-year record of the difference between the June projections and the final estimates. Using world wheat production as an example, changes between the June projection and the final estimate have averaged 16.7 million tons (3.3 percent) and ranged from -24.5 to 20.4 million tons. The June projection has been below the final 6 times and above the final 4 times.

RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 – 1990/91 1/					
	Difference		Lowest	Highest	Below	Above
	Average	Average	Difference		Final	Final
	Percent	---Million Metric Tons---			Number of Years 2/	
WHEAT						
World	3.3	16.7	-24.5	20.4	6	4
U.S.	3.9	2.4	-4.2	8.4	6	4
Foreign	3.5	15.5	-26.2	17.5	6	4
COARSE GRAINS 3/						
World	3.4	25.9	-31.4	76.0	5	5
U.S.	13.0	23.6	-30.2	70.3	4	6
Foreign	1.9	10.5	-14.0	28.6	4	6
RICE (Milled)						
World	3.1	9.7	-21.8	11.4	7	3
U.S.	6.3	0.3	-1.1	0.5	5	4
Foreign	3.1	9.7	-21.9	11.2	7	3
SOYBEANS						
World	N/A	N/A	N/A	N/A	N/A	N/A
U.S.	8.6	4.2	-6.5	12.0	4	6
Foreign	N/A	N/A	N/A	N/A	N/A	N/A
		---Million 480-lb. Bales---				
COTTON						
World	4.2	3.3	-13.9	5.6	6	3
U.S.	10.1	1.3	-2.8	1.3	5	5
Foreign	3.5	2.4	-12.4	4.3	6	4
UNITED STATES		-----Million Bushels-----				
CORN	13.7	786	-990	2,379	4	6
SORGHUM	16.6	122	-228	171	6	4
BARLEY	13.2	52	-73	206	5	5
OATS	21.2	68	-77	231	3	7

1/ The final estimate for 1981/82-1989/90 is defined as the first November estimate following the marketing year and for 1990/91 last month's estimate.

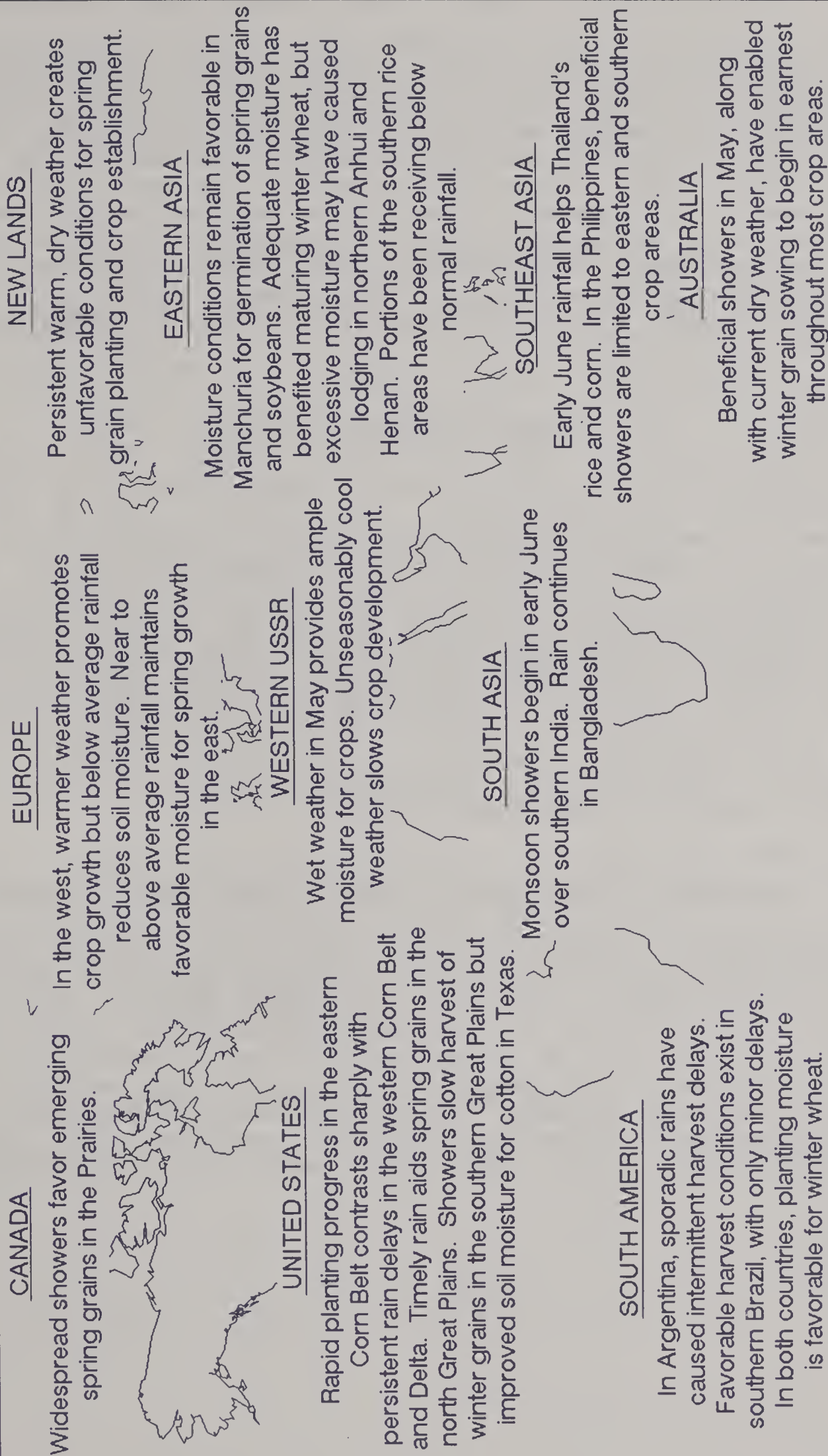
2/ May not total ten if projection was the same as the final.

3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

WORLD AGRICULTURAL WEATHER HIGHLIGHTS

JUNE 11, 1991

NOAA/USDA JOINT AGRICULTURAL WEATHER FACILITY



(More details are available in the Weekly Weather and Crop Bulletin.

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WEATHER BRIEFS

SOVIET NEW LANDS: DRYNESS HINDERS SPRING GRAIN EMERGENCE

Recent dry weather has become a concern across the major spring wheat production area in the New Lands of the Soviet Union. Precipitation during winter 1990/91 was normal-to-above normal across this region. Melting snow left soil moisture at mostly adequate levels during early spring. However, precipitation has been light and in some areas nonexistent for the period of April 1 - June 11, 1991. Temperatures throughout the winter and into June, 1991 have been mostly unseasonably warm in the west and central New Lands and mostly below normal in the east. The warm temperatures, combined with dry weather, have depleted surface moisture to levels that are unfavorable for spring grain planting and early plant establishment. Historically, the affected area accounts for about 65 percent of the Soviet spring wheat production.

TAIWAN: DROUGHT CONTINUES

During late fall and early winter, 1990, a drought developed in the western Pacific covering an area from Okinawa, Japan, south to Luzon in the Philippines, and west to the south coast of China. Taiwan, lying in the center of this region has been adversely affected. Precipitation for most of Taiwan has been 50 percent or less than normal for the period of October 1, 1990 to May 31, 1991, and dryness has continued through June 11, 1991. Temperatures have been above normal during late May and early June, 1991, adversely affecting agriculture and increasing demands on limited water resources. According to press reports the Taiwan Council of Agriculture has declared six counties in the south and east "agricultural disasters" and farmers have been "forced" to halt planting. The drought is also hurting industry according to press reports. Reservoirs are at their lowest levels in ten years and hydroelectric generation output has dropped.

AUSTRALIA: RAINS GREATLY IMPROVE WINTER WHEAT PLANTING

Timely precipitation from May 20 through June 11, 1991, greatly increased topsoil moisture levels across southern and eastern Australia, enabling planting of winter grains. Earlier in May, surface moisture levels were insufficient for germination and planting delays occurred. Winter grain planting can extend into July, however optimum planting dates end by mid-June. While precipitation has been frequent and widespread, dry periods have occurred permitting planting to progress. Precipitation has been lighter across Western Australia's wheat area. Rains during late May increased topsoil moisture levels for planting. However, more rain is needed to replenish lower soil levels.

PRODUCTION BRIEFS

THE NETHERLANDS: APPLE AND PEAR CROPS DAMAGED BY FROST

Frost on April 20 is believed to have caused more damage to apple and pear crops in the Netherlands than did early frosts in 1990. Preliminary assessments by the Fruit and Vegetable Board indicate that 1991 apple production may be down 30 to 40 percent compared to 1990 while pear production may be off 10 to 20 percent. Damage to the potato crop was estimated to have been minimal.

POLAND: POULTRY PRODUCTION INCREASING IN 1991

Total Polish poultry meat output in 1991 is forecast at 340,000 tons, 3 percent above 1990, according to the U.S. agricultural attache in Warsaw. Production in 1990 was down 6 percent as distortions caused by the switch to a market-based economy had a negative impact on both production and demand for poultry meat. In early 1991, poultry meat prices have shown some improvement, encouraging producers. Egg production in 1991 is forecast at 7.8 billion eggs, 2 percent above 1990 but still well below the 1989 output level of 8.2 billion.

ARGENTINA: APPLE CROP ESTIMATE LOWERED

Post-harvest information indicates the recently harvested 1991 Argentine apple crop totaled 980,000 tons, 80,000 tons smaller than earlier forecast. Apparently, pre-harvest surveys over-estimated the amount of apples on interior branches of the typical tree. The smaller crop is expected to impact the processing sector more than the fresh market.

AUSTRALIA: APPLE HARVEST DOWN

Revised estimates place 1991 apple production at 292,000 tons, down from both the December estimate of 350,000 tons and from last year's crop of 315,000 tons. The decline from the December estimate is reportedly due to insufficient chilling hours during the flowering period which caused fruit to drop off the tree before maturity and to dry weather at the end of the growing season which hurt fruit size. The lower production is expected to reduce exports of both fresh apples and concentrated apple juice.

CHINA: ANOTHER BUMPER WINTER GRAIN HARVEST IN 1991/92

Chinese officials are forecasting a bumper harvest of winter grain (about 90 percent wheat and 10 percent barley) due to very favorable weather during the growing season. They say the winter grain crop is expected to equal or exceed the 1990 record output of nearly 100 million tons, despite some problems with diseases and pests in Anhui and Shandong, drought in Shaanxi, and flooding in the southern wheat production areas. The officials are pleased by the prospect of another bumper crop in 1991 but they foresee problems with grain transportation, storage, prices, and procurement.

CHINA: WAREHOUSE EXPANSION NEEDED FOR BUMPER CROPS

There are still millions of tons of grain from last year's record Chinese crop in open-air storage and another large grain and oilseed crop is expected this year. The Chinese government plans to invest 1.72 billion yuan (\$325 million) over the next 5 years in the construction of grain warehouses and edible-oil tanks in an effort to ease the country's critical storage problem. The new warehouses and tanks will hold an additional 25 million tons of grain and one million tons of edible oil. In the short run, the government is urging local government authorities to help finance the building of simple grain warehouses.

SOUTH KOREA: GOVERNMENT CONSIDERS RICE PRODUCTION REFORMS

The South Korean government is considering a number of measures to reform its rice industry to make it more internationally competitive. These measures include expanding the farm size per family; establishing a development bank; encouraging diversification into cash crops; and increasing mechanization, research and development. Officials say the reforms are not intended to lead to opening the market to rice imports. However, many farmers and their political supporters are not convinced and will likely oppose the government reforms. Farmers only make up about 20 percent of the voting population, but a large majority of city residents have strong farm ties and support policies to protect South Korean rice self-sufficiency and the traditional rural way of life. Last year thousands of farmers protested when the government appeared to be moving toward opening its market to rice imports.

SWITZERLAND: FREEZE DAMAGES FRUIT CROP

The U.S. agricultural attache in Bern reports that an April cold wave damaged fruit crops. Losses of cherries and strawberries were described as severe while most other fruits suffered damage described as significant. Grape losses were minimal because vines had not started spring growth at that time.

FRANCE: COLD DAMAGES FRUIT AND NUT CROPS

Freezing temperatures on April 20-21 and cold wet weather through much of May caused substantial damage to French tree and vine crops, according to the U.S. agricultural counselor in Paris. Most regions of France were hit by the freeze with southwestern regions hurt the most. Fresh cherries were hit the hardest with 1991 production now forecast to be 30 to 40 percent below the 1990 level. Forecast declines for the apricot and peach and nectarine crops are in the 10 to 15 percent range. Preliminary assessments indicate that the apple crop will be below 1990 with red varieties down the most. Damage assessment for pears is not yet available, although it is known that some losses occurred. The southwest normally accounts for roughly one-fourth of the apple crop and 10 to 15 percent of the pear crop. The cold wet weather affected vineyards in most regions with extensive damage reported to crops in Bordeaux, Provence, Burgundy, Champagne, and the Loire Valley. Preliminary assessments indicate severe injury to the walnut crop with the possibility of a 40 percent drop compared with 1990. The cold weather in the southwest may have damaged over half that region's walnut production.

FRANCE: PRUNE PRODUCTION PROSPECTS REDUCED

Freezing weather on April 20 and 22 and cold wet weather during May have damaged the 1991 prune crop. Losses are reported to be concentrated in the southwestern part of the country. According to The U.S. agricultural counselor in Paris, early indications point to a crop of 25,000 tons compared to 37,000 tons produced in 1990. The 37,000 ton estimate for 1990 represents an 11-percent upward revision in the estimate due to better than expected fresh to dried fruit yields.

POLAND: GRAIN HARVEST TO DECLINE

Grain production in Poland is expected to decline about six percent this year due to reduced seedings, less intensive use of inputs, and normal weather. Last year's grain production was boosted to a record 28 million tons by abnormally favorable weather and slightly larger planted area. The bumper harvest, relatively high stocks, and falling demand due to Poland's policy of conversion to free markets, depressed prices and is likely to result in exports of 600,000 tons, making Poland a net exporter for the first time since World War II.

JAPAN: CHANGES PLANNED IN AGRICULTURAL LAWS

The Ministry of Agriculture, Forestry, and Fisheries (MAFF) recently announced a plan to reform major agricultural legislation, the Farmland Law and the Food Control Law. The Farmland Law was enacted in 1952 to protect farmers' ownership of land by strictly limiting the transfer of farmland to other owners or other uses. In time the law was eventually revised to allow some land consolidation and farmland rentals, but there are still restrictions on the acquisition of farmland by non-farmers, including corporations. Reform of these restrictions is aimed at encouraging new entrants into agriculture and promoting larger-scale farms in order to help Japanese agriculture benefit from economies of scale and become more efficient and competitive.

The Food Control Law was enacted in 1942 to ensure the stable production and distribution of staple food grains. Although some parts of this law have been relaxed over the years, the Food Agency of MAFF maintains complete control over production, pricing and marketing of these grains, including rice. MAFF is now considering ways to gradually reduce control over the next ten years. Changes are expected sooner in MAFF's controversial, mandatory rice land diversion program, which has diverted a third of Japanese paddy land to other crops as a way to counter the over-production of rice resulting from high support prices. The government is expected to make the program voluntary, so that only farmers who want to receive the support price would have to participate. This would allow farmers to grow as much rice as they want and sell it on the open market.

TAIWAN: FORESTRY OUTPUT TRENDING DOWNWARD

Taiwan's timber production has declined steadily since 1988 due to the inaccessibility of existing mature timber stands and intensifying environmental concerns among the general public. In April 1989, Taiwanese authorities imposed an annual logging limit of 450,000 cubic meters and halted harvest of natural stands of softwoods. Since then, however, logging has been well below the limit with harvests of 157,000 and 114,000 cubic meters in 1989 and 1990, respectively. A total of 1.86 million hectares, or over one-half of Taiwan's total area, is covered by forests. Wood production in Taiwan during the last three years is estimated as follows in 1,000 cubic meters:

<u>Product</u>	<u>1988</u>	<u>1989</u>	<u>1990</u>
Logs	253	157	114
Lumber	998	959	780
Veneer	939	929	885
Plywood	769	569	456

FEATURE COMMODITY ARTICLES

ARGENTINA OILSEED PRODUCTION

Argentina is one of the largest producers and exporters of oilseeds and oilseed products and the record harvest of major oilseeds in 1990/91 represents 8 percent of the world's production. Soybeans are the most important oilseed in Argentina, followed by sunflowerseed and flaxseed. Soybean production in 1990/91 is estimated at a record 11.3 million tons. Argentina is the fourth largest soybean producer, following the United States, Brazil, and China. Argentina is the second largest producer of sunflowerseed in the world, producing an estimated 3.9 million tons in 1990/91 and is the world's second largest producer of flaxseed, with an estimated production of 480,000 tons in 1990/91. Cottonseed and peanuts are also produced. There is much interest but little actual production of several new oilseeds -- safflower, jojoba, and rapeseed.

Total oilseed production in Argentina has grown more than 150 percent since the early 1980's. The 1990/91 oilseed harvest is at a record level, with an estimated output at 16.6 million tons. Oilseed area has also increased significantly, from 4.2 million hectares in 1980/81 to 8.5 million hectares in 1990/91, a 100 percent increase. In contrast, total grain area decreased by 18 percent to 9.5 million hectares in the same period. The accompanying table provides the USDA estimates for Argentina major oilseeds: harvested area, yields, and production from 1980/81 to 1990/91.

SOYBEANS

Soybeans are the primary oilseed produced in Argentina, accounting for 68 percent of the 1990/91 oilseed production in Argentina, and 11 percent of the world's soybeans. This year's soybean crop is forecast at a record 11.3 million tons, surpassing the previous record in 1989/90 by 5 percent. Soybean production has shown extensive growth over the last decade, increasing by an average of 14 percent per year at albeit, an uneven rate. Recently the increases have been smaller. Future growth in production is expected to be slower as most of the land suitable for soybeans is under cultivation.

An estimated 92 percent of the 1990/91 Argentine soybeans are produced in three provinces: Santa Fe, Buenos Aires, and Cordoba. This area, called the Pampas, is the central and most important growing area of Argentina. Soybeans compete with corn, sunflower, sorghum, peanuts, and pasture for the greatest economic returns. After years of increases, culminating in record area in 1989/90, soybean harvested area in 1990/91 declined by 3 percent to an estimated 4.8 million hectares. The decline is attributed to regional increases in peanuts and a marginal increase in corn in the Pampas.

Soybean yields in Argentina are among the highest in the world. The 1990/91 average yield is forecast at 2.35 tons per hectare, second only to the record yield of 2.41 tons per hectare in 1983/84. Favorable weather at planting and throughout the growing season increased the yield potential for this year's harvest. Although high yields are generally dependent on rainfall, weed control and management were important this year. Timely rainfall benefited both first- and second-crop soybeans. Harvest of first-crop soybeans began in early April and extended through May, while second-crop soybeans will be harvested in May and June. This year's harvest is progressing, but has been slowed by rains.

A significant share of Argentina soybean area is double-cropped, ranging between 30 and 70 percent; soybean planting traditionally follows wheat harvesting. This year, an estimated 35 percent of soybean area was double-cropped, a slight increase from 1989/90, due to more winter wheat area. The practice of double-cropping soybeans is limited to the rich soil regions of northern Buenos Aires, southern Santa Fe, and southern Cordoba provinces. Generally, yields are lower from second-crop soybeans than from first-crop soybeans.

Agricultural inputs for soybean production are used sparingly. Soybeans are not considered responsive to fertilizer application, and pesticide use is limited because it is not cost effective. Insecticides are used less often than other pesticides because sprayers are typically equipment that would have to be rented. An estimated 30 to 50 percent of farmers retain their own seed for planting, despite having high-yielding varieties available. Fuel is often procured by barter system from the National Grain Board.

Future growth in soybean production is expected, but at a slower rate than the last 10 years. Southern Buenos Aires and the northern provinces of Tucuman and Salta are possible expansion areas, but are less suitable for soybeans. Researchers hope to develop varieties that would be suitable for these new areas, but there are other problems associated with expansion. In southern Buenos Aires province, soybeans would have to displace sunflower, corn, or wheat. In Tucuman and Salta, increases depend on adequate transportation; they are further from port facilities. Estimates vary, but some analysts believe that soybean area could increase by another million hectares in the next 10 years.

Soybean production increases may be dampened by lower yields. New areas would likely be planted to low-yielding varieties and the central soybean region may experience lower yields. There is growing concern among researchers that constant soybean planting in the central soybean region has contributed to a loss of soil structure due to a lack of humus. This may cause a reduction in soil moisture carrying capacity which will affect yields.

SUNFLOWERSEED

Argentina is the world's second largest producer of sunflowerseed, accounting for nearly 18 percent of the world production in 1990/91. The 1990/91 sunflowerseed harvest is estimated at 3.9 million tons, 3 percent larger than 1989/90, and the second largest since the record 4.1 million crop in 1985/86. Sunflowerseed production comprises an estimated 23 percent of total oilseed production and is the second most important oilseed in Argentina. Sunflowerseed production has increased by 186 percent from 1980/81. However, future growth depends on improving average yields and maintaining area.

Sunflowerseed is grown throughout the Pampas, with over half of the production concentrated in Buenos Aires province. A small, but regionally important crop is also grown in Chaco province. Planted area in central Argentina has increased in recent years as farmers are increasingly satisfied with highly productive and drought-tolerant hybrids. Nearly all farmers use hybrid seed.

Harvested area declined 18 percent in 1990/91, reflecting producer concern over last year's reduced yields and weak prices at planting time. Stronger cotton and wheat prices and the government's promise of reducing wheat export taxes displaced sunflowerseed area. Sunflowerseed is rarely double-cropped with wheat; differences between first- and second-crop yields for sunflowerseed are large, reducing second-crop profitability. Less than 10 percent of the sunflower area was double-cropped in 1990/91. Sunflowerseed planting started in Chaco in September and finished in Buenos Aires by the middle of December. Harvest began in January for the minor northern crop and finished by May, nationwide.

Argentina's 1990/91 sunflowerseed yields are forecast at a record level of 1.70 tons per hectare, an increase of 25 percent from 1989/90. Favorable weather throughout the growing season has led to increased yield potential, far surpassing the previous record of 1.46 tons per hectare in 1988/89. With beneficial weather during the harvest, quality of this year's crop should be high. Farmers receive a bonus payment for sunflowerseed with more than 42 percent oil content.

For the near future, sunflowerseed production in Argentina should remain fairly strong. Annual output probably will continue to be primarily influenced by farmer satisfaction with sunflowerseed returns and the overall role that sunflowerseed plays in garnering foreign exchange as one of the country's primary export commodities. Production increases likely will be a result of higher yields from improved varieties and better agronomic practices.

FLAXSEED

Argentina produces an estimated 21 percent of the world's output of flaxseed. It is the fourth most important oilseed, accounting for 3 percent of Argentina's oilseed production. Flaxseed production is estimated at 480,000 tons in 1990/91, a 7 percent decrease from 1989/90. Above-average yields were estimated at 0.84 tons per hectare, but below earlier expectations; heavy rains at harvest decreased yield potential.

Flaxseed is Argentina's largest winter oilseed. It is primarily grown in Entre Rios and Buenos Aires provinces where typically 87 percent of the crop is produced. Planting occurs in May and June, with harvesting in November and December. Harvested area is estimated at 580,000 hectares this year, but has been slowly decreasing over the last 10 years. Lack of world demand and inefficient production has made flaxseed the least profitable of the cash crops.

COTTONSEED

Argentina produces approximately 1 percent of the world's production of cottonseed. It is regionally important in Argentina and is a by-product of the cotton industry. Cottonseed production is estimated at 490,000 tons in 1990/91, an 11 percent increase from 1989/90.

Chaco and Formosa provinces produce the majority of Argentine cotton. In 1990/91, planted area increased by 12 percent due to higher international prices and poor competition from sunflowerseed and soybeans. Late October flooding in Chaco province in 1990 necessitated replanting of some lower-lying cotton and sunflower areas. Cotton replanting was finished by mid-December. Cotton yields vary widely and are dependent on planting time, variety, weather, and management practices. Harvesting of cotton began in January and will continue through June. Most of the harvesting is done by hand. Higher quality cotton is harvested first and the quality deteriorates as the season progresses. Oil and animal feed are processed from cottonseed and 5 percent is used for the next year's planting.

PEANUTS

Argentina produced slightly more than 2 percent of the world's peanuts in 1990/91, with an estimated output of 480,000 tons, an increase of 28 percent over 1989/90. Peanut production has ranged between 240,000 and 520,000 tons over the last 10 years, but has generally increased. Peanuts account for 3 percent of the oilseed production in Argentina, but are regionally important. The 1990/91 estimated peanut yield of 2.38 tons per hectare is second only to the record yield of 2.61 tons per hectare in 1985/86.

Peanut production is concentrated in central Cordoba province where typically 99 percent of the crop is grown. Peanut area has ranged between 120,000 and 230,000 hectares and is estimated at 200,000 hectares in 1990/91. There were seed shortages at planting time due to the poor crop of 1989/90, but farmers reportedly planted as much as they intended. Several varieties are planted: 65 percent of the area is planted with runner varieties, 25 percent with Colorados or redskins, and 10 percent with manfredi varieties or blancos. Runner varieties predominate because they typically yield 30 percent more and produce better quality peanuts. Runners are seeded all through November with colorados being seeded later; runners need a longer growing season. Peanut harvest begins by the end of the April and continues through May for the majority of the crop, especially the runner varieties. Harvesting of colorado peanuts occurs earlier.

Peanut farmers make greater use of costly inputs and apply more intense crop management techniques in contrast to other Argentine grain and oilseed producers. As a result, peanut yields have increased during the last 10 years and are at levels similar to those of soybeans in Argentina. Favorable weather throughout the season and good management techniques improved this year's yield potential. Fungicides are needed for foliar diseases; most farmers apply fungicides 3 to 4 times in a season. A minority of farmers apply them either 1 to 2 times or 5 to 6 times. Peanut farmers usually grow wheat, corn, sorghum, soybeans, and have some land for hogs and cattle. They also manage these other crops very well. Peanuts and soybeans alternate in a rotation with sorghum and corn.

Peanuts cost more to produce than soybeans, with estimates ranging between 3 to 4 times as expensive, but the profits are higher. The price relationship favored peanuts over soybeans this year, which led to an 11 percent increase in peanut area from 1989/90 despite the higher management costs required for peanuts. Planting decisions depend on prices, but since peanut future prices are not known, much of the decision is based on the profitability of last year's crop. Planting of alternative crops depends to a large extent on last year's yields and the agronomic conditions at planting time.

The peanut industry in Cordoba has changed greatly in the last 10 years. Peanuts used to be harvested almost exclusively for crushing; they were shelled in the field and processed. Now modern harvesting techniques turn the peanut up in the field where they undergo natural drying in the shell. Farmers currently produce confectionery peanuts, and the entire industry, from harvesting to processing, is geared for this new use. The best looking, highest quality peanuts are used for confectionery purposes. In a typical year, this is 60 to 70 percent of the crop -- the remainder is crushed. The crush price is used as the base price, with bonus prices paid for high quality peanuts. This bonus price can be almost double the crush price. In addition, confectionery peanuts are no longer assessed a commodity specific export tax, such as the 6 percent export tax on peanuts for processing.

Future growth in peanut production depends on continued favorable price relationships and improved yields. Salta and Jujuy provinces have small areas planted to peanuts and may expand. However, these northern provinces are further from port facilities and incur higher transportation costs.

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TABLE 9

Argentina Oilseeds: Area, Yield, and Production

	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91p
<u>AREA (1,000 hectares)</u>											
Soybean	1740	1986	2281	2910	3270	3316	3510	4260	4000	4950	4800
Sunflower	1280	1673	1902	1989	2350	3046	1800	2058	2200	2800	2300
Flaxseed	726	740	864	770	732	688	745	655	535	575	575
Cottonseed	300	399	360	470	447	320	330	515	501	570	640
Peanut	197	166	125	146	143	168	233	192	150	180	200
Total	4243	4964	5532	6285	6942	7538	6618	7680	7386	9075	8515
<u>YIELD (metric tons per hectare)</u>											
Soybean	2.011	2.09	1.841	2.405	2.064	2.201	1.994	2.277	1.625	2.172	2.354
Sunflower	0.984	1.184	1.262	1.106	1.447	1.346	1.389	1.361	1.455	1.357	1.696
Flaxseed	0.84	0.811	0.885	0.857	0.855	0.669	0.835	0.817	0.86	0.897	0.835
Cottonseed	0.567	0.727	0.611	0.694	0.655	0.681	0.585	0.907	0.635	0.772	0.766
Peanut	1.234	1.627	2	2.253	1.888	2.613	2.223	2.344	1.62	1.867	2.375
<u>PRODUCTION (1,000 metric tons)</u>											
Soybean	3500	4150	4200	7000	6750	7300	7000	9700	6500	10750	11300
Sunflower	1260	1980	2400	2200	3400	4100	2500	2800	3200	3800	3900
Flaxseed	610	600	765	660	626	460	622	535	460	516	480
Cottonseed	170	290	220	326	293	218	193	467	318	440	490
Peanut	243	270	250	329	270	439	518	450	243	336	475
Total	5783	7290	7835	10515	11339	12517	10833	13952	10721	15842	16645

June 1991

Production Estimates and Crop Assessment Division, FAS, USDA

World tobacco production for 1991 is projected at 7.1 million tons, up slightly from 1990. Production increases are forecast in Zimbabwe, Argentina, and Malawi because of favorable prices, and in Bulgaria because of the introduction of a free market system. Declines are projected in the United States, Brazil, India, Turkey, Greece, Italy, and Japan because of production controls. Total production in China is unchanged.

Total unmanufactured tobacco production in North America for 1991 is forecast at 826,000 tons, down from 836,000 in 1990. Production is forecast below last year in all three countries. United States production is forecast at 732,000 tons, down slightly due to reduced flue cured planting intentions and lower yield expectations for both flue-cured and burley tobacco. Average yields are expected this year compared to above average yields in 1990. Mexican production is forecast at 33,000 tons, down about 2,000 tons from last year. Flue cured production is down 5,000 tons to 6,000 tons due largely to grower displeasure with the liquidation of the government tobacco marketing agency and their failure to sign contracts with buyers. In contrast, burley tobacco, which is exported, is up 1,000 tons at 19,000 as producers received increased financial and technical support from tobacco buyers and exporters. Canada is expected to produce a 5 percent smaller crop in 1991 than last year because of reduced plantings. High domestic taxes and a weak export market are the reasons for the expected decline in production.

Tobacco production in Brazil for 1991 is forecast at 431,000 tons, down 4,000 from 1990, due to lower yields in the southern states because of drought. Total unmanufactured tobacco production in Argentina for 1991 is forecast up 38 percent at 93,000 tons because of favorable weather and both technical and financial support given by the tobacco exporters. The 1991 crop was of good quality and the farm price was 50 percent above last year.

Total EC tobacco production is forecast at 430,000 tons, down slightly from 1990. EC tobacco production would not be practical without a 2 billion dollar a year subsidy which is looked upon as a payment to small farmers in less developed areas. In Italy, 1991 tobacco production is forecast to drop slightly from the 1990 record of 221,000 tons to 220,000 because of reduced plantings. High export subsidies and the failure of the EC to reach agreement with producers has resulted in a 107 percent expansion in Italian production over the past five years. Production in Greece is projected at 120,000 tons, down 4 percent from last year based on reduced plantings. Spanish tobacco production is expected to be up 1 percent at 44,000 tons, while in France, production is forecast down 6 percent at 27,000 tons.

In Yugoslavia, tobacco production is projected to recover in 1991 to 63,000 tons from the drought reduced 1990 crop of only 47,000 tons. In Bulgaria, tobacco production is also expected to recover in 1991 and reach 82,000 tons due to relief from drought, limited free market reforms, and a return of some of the ethnic producers. During 1989 and 1990, production fell nearly 50 percent from normal levels of over 100,000 tons to 68,300 and 61,000, respectively. In Romania, 1990 tobacco production fell 50 percent to 14,000 tons due to drought and unfavorable prices. Production for 1991 is expected to be over 16,000 tons because producer prices remain unfavorable.

South Africa's 1991 tobacco crop is estimated at 39,000 tons, up 33 percent from last year's severely hail damaged crop, but down slightly from 1989 due to reduced plantings. In Zimbabwe, the 1991 production is estimated at 170,000 tons, up 22 percent from last year because of increased plantings and higher yields. Flue cured prices were up 32 percent and were a major factor in the expected 22 percent increase in production that is estimated at 163,000 tons. In Malawi, 1991 production is estimated at 109,000 tons, 7 percent above last year.

Chinese tobacco production for 1991 is expected to be unchanged from the 2.7 million tons produced in 1990. Pressure from the local government to maintain production is likely to continue since tobacco is the major source of local revenue. Production dropped 5 percent during 1990, from 2.8 million tons in 1989 to 2.7 million because of poor returns to farmers.

Indian tobacco production for 1991 is forecast at 510,000 tons, down from the 564,000 produced in 1990, which was the largest crop since the 590,000 record of 1983. Production is down due to reduced plantings of dark-air and sun-cured tobacco (these types are not subject to acreage controls) which were sharply increased in 1990 in response to high prices for the 1989 crop. Japanese tobacco production for 1991 is expected to fall 5 percent to 75,000 tons due to reduced yields compared to above average yields last year. Thailand's crop for 1991 is estimated at 76,000 tons down slightly from last year. Production of flue-cured and burley tobacco is forecast up in 1991, but oriental tobacco is expected to fall 25 percent because of drought.

South Korean tobacco production for 1991 is estimated at 72,000 tons, up 8 percent from 1990's rain damaged crop. The Philippine 1991 tobacco crop is estimated at 78,000 tons, up 8 percent from 1990 because of expanded plantings inspired by higher prices and improved weather.

Indonesian tobacco output for 1991 is projected at 159,000 tons, up 3 percent, due to increased plantings inspired by higher prices. Higher tobacco prices have caused planted area to increase by 4 percent as some rice farmers have expanded flue-cured production on irrigated land. Malaysian production for 1991 is forecast at 11,000 tons, about the same as 1990 despite a 47 percent increase in area, but offset by flash flood damage. Taiwan tobacco production for 1991 is estimated 19,000 tons, down slightly from 1990 because of a reduction in planted area.

Turkey is expected to produce 242,000 tons of tobacco in 1991, down from the 1990 crop of 282,000 tons. The 1990 crop was originally estimated at 260,000 tons, but increased plantings and favorable weather resulted in the larger crop. Farmers were encouraged to expand plantings in 1990 because tobacco produced higher incomes than other crops. Support prices were up 32 percent in 1990, but for 1991, a tighter grading system has been introduced.

WORLD UNMANUFACTURED TOBACCO PRODUCTION BY TYPE

World unmanufactured tobacco production for 1991 is estimated at 7.1 million tons, farm sales weight basis, up slightly from 1990. Estimated production by leaf type is as follows:

	Revised	Revised	Preliminary
	1989	1990	1991
Leaf Type	-----1000 metric tons-----		
Flue-cured	4,099	4,004	4,028
Burley	692	750	819
Oriental	801	773	752
Dark air/sun-cured	1,181	1,234	1,174
Light air-cured	90	75	77
Dark air-cured, cigar	206	198	208
Dark fire-cured	45	61	59
<u>Total 1/</u>	<u>7,114</u>	<u>7,094</u>	<u>7,119</u>

1/ Individual types may not add to total due to rounding.

FLUE-CURED

Production is estimated at 4.0 million tons, unchanged from 1990 and 1989. Flue-cured production is projected to be up in Zimbabwe, Argentina, Indonesia, and South Korea reflecting favorable farm prices. In Indonesia, tobacco displaced rice as a more profitable crop. Production is expected to fall in the United States, Brazil, Canada, and Italy due to reduced areas. In addition, yields in the United States are expected to return to a more normal pattern this year. Brazilian weather in the south was unfavorable for 1991 and projected yields are down.

BURLEY

Production for 1991 is estimated at 819,000 tons, up 9 percent from last year. Estimates were increased for the United States, Malawi, Italy, and Argentina because of increased plantings. In Italy, production is projected up 26 percent and reflects reductions in dark air/sun-cured production.

ORIENTAL

Production is estimated down 3 percent from 1990 at 752,000 tons. Output in Turkey, the largest producer, was up in 1990 due to favorable prices, but for 1991 production is forecast to be 14 percent below 1990 due to revisions in quality standards for tobacco purchased by the state. Production is also down in Greece due to reduced plantings. These declines more than offset increases in Bulgaria and Yugoslavia as these two countries recover from droughts.

DARK-AIR/SUN-CURED

Production is estimated at 1.2 million tons for 1991, down 5 percent from last year. Indian production is estimated at 382,000 tons, down from 451,000 in 1990 because of lower farm prices (this type of tobacco is not under government control and is subject to free market conditions.) Production is down 15 percent to 68,000 tons in Italy as more acreage is moved to Burley. Production was up in Brazil and Indonesia, but not enough to offset the declines in India and Italy.

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TABLE 10

TOTAL UNMANUFACTURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
-----HECTARES-----METRIC TONS-----						
NORTH AMERICA						
Canada	31,140	28,160	25,640	75,573	64,025	60,970
Mexico	33,029	22,118	18,400	59,890	34,653	32,560
United States	274,681	296,643	306,154	620,152	737,065	732,015
REGION TOTAL	338,850	346,921	350,194	755,615	835,743	825,545
SOUTH AMERICA						
Argentina	55,248	49,155	57,127	80,544	67,624	93,440
Bolivia	1,250	1,250	1,250	1,250	1,250	1,250
Brazil	294,000	282,000	291,000	462,000	435,000	431,000
Chile	3,423	3,909	4,393	11,105	12,785	14,283
Colombia	19,007	19,604	19,879	29,348	31,580	32,478
Ecuador	1,800	1,800	1,800	3,850	3,850	3,850
Paraguay	2,740	3,065	3,065	3,545	6,050	8,050
Peru	2,500	2,500	2,500	3,100	3,100	3,100
Uruguay	800	800	800	1,400	1,400	1,400
Venezuela	7,917	8,012	8,152	13,490	13,597	12,423
REGION TOTAL	388,685	372,095	389,966	609,632	576,236	601,274
CENTRAL AMERICA						
Costa Rica	851	888	760	1,567	1,728	1,313
El Salvador	544	562	560	970	1,038	1,025
Guatemala	6,440	6,244	6,105	11,866	10,568	10,086
Honduras	2,531	2,641	2,864	4,246	4,605	5,411
Nicaragua	2,240	2,240	2,240	4,550	4,550	4,550
Panama	720	720	720	1,302	1,302	1,302
REGION TOTAL	13,326	13,295	13,249	24,501	23,791	23,687
CARIBBEAN						
Cuba	50,000	50,000	50,000	44,000	44,000	44,000
Dominican Rep.	27,011	14,830	18,450	28,069	15,085	25,312
Jamaica & Dep	1,175	1,175	1,175	2,339	2,339	2,339
REGION TOTAL	78,186	66,005	69,625	74,408	61,424	71,651
NORTH AFRICA						
Algeria	2,600	2,700	2,700	4,800	5,000	5,000
Libya	900	900	900	1,450	1,450	1,450
Morocco	5,483	5,835	5,835	6,551	7,288	7,288
Tunisia	5,455	5,500	5,500	5,610	5,650	5,650
REGION TOTAL	14,438	14,935	14,935	18,411	19,388	19,388
OTHER AFRICA						
Angola	3,950	3,950	3,950	3,900	3,900	3,900
Burundi	2,000	2,000	2,000	1,600	1,600	1,600
Cameroon	3,400	3,400	3,400	5,500	5,500	5,500
Congo	4,000	4,000	4,000	1,800	1,800	1,800
Cote D' Ivoire	10,000	10,000	10,000	2,490	2,490	2,490
Ethiopia	3,000	3,000	3,000	3,450	3,500	3,500
Ghana	3,950	3,950	3,950	1,433	1,839	2,080
Kenya	10,335	8,805	8,805	11,510	9,910	9,910
Madagascar	5,900	5,900	5,900	5,500	5,500	5,500
Malawi	89,640	100,110	104,700	86,615	101,657	109,300
Mozambique	2,700	2,700	2,700	2,900	2,900	2,900
Nigeria	7,700	7,300	7,300	9,223	9,223	9,223
South Africa	24,539	24,841	24,175	38,949	29,106	38,611
Tanzania	21,250	21,250	21,250	15,055	14,055	14,055
Togo	4,000	4,000	4,000	2,000	2,000	2,000
Uganda	3,500	4,300	4,300	3,200	4,000	4,000
Zaire	3,700	3,700	3,700	4,110	4,110	4,110
Zambia	3,500	3,500	3,500	4,300	4,300	4,300
Zimbabwe	60,544	62,924	70,870	135,205	139,803	170,250
REGION TOTAL	267,608	279,630	291,500	338,740	347,193	395,029

June 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 10 (Continued)

TOTAL UNMANUFACTURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
-----HECTARES-----METRIC TONS-----						
OTHER ASIA						
Bangladesh	40,500	40,500	40,500	40,000	40,000	40,000
Burma	55,000	55,000	55,000	45,000	45,000	45,000
Cambodia	9,000	9,000	9,000	5,000	5,000	5,000
China	1,726,500	1,617,250	1,617,250	2,830,353	2,692,300	2,692,300
India	377,000	421,100	380,000	492,800	564,400	510,000
Indonesia	227,529	236,390	246,250	146,914	154,480	159,120
Japan	30,661	29,964	30,411	74,397	80,542	74,600
Korea, North	37,000	37,000	37,000	46,000	46,000	46,000
Korea, South	30,985	31,339	30,566	78,422	66,213	71,500
Laos	4,000	4,000	4,000	3,000	3,000	3,000
Malaysia	12,481	10,488	15,400	13,877	10,997	11,000
Pakistan	43,216	42,124	42,124	73,950	70,420	70,420
Philippines	50,150	49,830	52,820	73,305	72,320	78,420
Sri Lanka	12,165	12,165	12,165	9,000	9,000	9,000
Taiwan	8,019	7,941	7,755	18,986	19,131	18,800
Thailand	56,716	63,665	63,000	64,780	76,235	75,700
Vietnam	32,000	32,000	32,000	28,000	28,000	28,000
REGION TOTAL	2,752,922	2,699,756	2,675,241	4,043,784	3,983,038	3,937,860
MIDDLE EAST						
Iran	18,000	18,000	18,000	25,000	25,000	25,000
Iraq	2,000	2,000	2,000	2,180	2,180	2,180
Jordan	2,931	2,953	2,953	2,827	2,800	2,800
Lebanon	3,750	3,750	3,750	5,000	5,000	5,000
Oman	1,800	1,800	1,800	2,000	2,000	2,000
Syria	10,145	12,757	15,650	10,859	13,007	17,013
Turkey	284,542	300,953	260,953	269,517	282,166	242,166
United Arab Em.	350	350	350	2,000	2,000	2,000
Yemen	3,300	3,300	3,300	5,720	5,720	5,720
REGION TOTAL	326,818	345,863	308,756	325,103	339,873	303,879
EUROPEAN COMMUNITY						
Belgium-Lux.	438	461	500	1,800	1,553	2,000
France	11,413	10,704	10,700	29,216	28,295	26,573
Germany	6,955	5,880	5,880	12,464	11,147	11,150
Greece	81,471	76,459	73,450	115,750	124,752	120,150
Italy	95,165	106,000	103,000	197,316	221,000	220,000
Portugal	2,076	2,257	2,450	5,472	5,573	6,048
Spain	27,330	23,450	23,550	45,415	43,500	43,980
REGION TOTAL	224,848	225,211	219,530	407,433	435,820	429,901
Switzerland	673	671	660	1,620	1,265	1,350
EAST EUROPE						
Albania	24,000	24,000	24,000	15,000	15,000	15,000
Bulgaria	72,661	52,891	61,100	75,537	66,858	82,400
Czechoslovakia	3,750	3,750	3,750	5,500	5,000	5,500
Hungary	9,082	8,700	10,000	12,869	14,346	18,816
Poland	29,429	30,150	30,150	60,000	62,050	62,050
Romania	34,400	16,845	19,000	27,500	14,200	16,500
Yugoslavia	49,000	45,000	50,000	63,270	46,620	62,271
REGION TOTAL	222,322	181,336	198,000	259,676	224,074	262,537
USSR	113,400	103,400	103,400	233,200	225,000	225,000
OCEANIA						
Australia	4,771	4,727	4,700	13,296	13,327	13,500
New Zealand	600	600	600	1,550	1,550	1,550
REGION TOTAL	5,371	5,327	5,300	14,846	14,877	15,050
OTHER 1/	7,502	7,282	7,062	6,781	6,635	6,464
WORLD	4,754,949	4,661,727	4,647,418	7,113,750	7,094,357	7,118,615

1/ Includes Guyana, Haiti, St. Vincent, Chad, Trin & Tobag, Cent. Afr. Rep. Liberia, Mali, Mauritius, Niger, Benin, Reunion, Sierra Leone, Swaziland, Cyprus, Israel, Austria, and Solomon Is.

TABLE 11
FLUE CURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
-----HECTARES-----METRIC TONS-----						
NORTH AMERICA						
Canada	30,640	27,700	25,200	74,456	63,000	60,000
Mexico	7,012	7,160	3,410	14,410	11,380	6,080
United States	158,242	168,785	165,182	366,665	426,034	397,805
REGION TOTAL	195,894	203,645	193,792	455,531	500,414	463,885
SOUTH AMERICA						
Argentina	31,600	29,500	32,300	48,325	43,645	58,700
Brazil	167,000	157,000	165,000	310,000	295,000	281,000
Chile	1,102	1,186	1,340	3,071	3,521	3,830
Colombia	2,944	2,971	2,810	5,117	5,222	5,185
Ecuador	650	650	650	1,575	1,575	1,575
Peru	1,200	1,200	1,200	1,820	1,820	1,820
Uruguay	665	665	665	1,250	1,250	1,250
Venezuela	4,997	5,097	5,362	8,350	8,512	8,000
REGION TOTAL	210,158	198,269	209,327	379,508	360,545	361,360
CENTRAL AMERICA						
Costa Rica	265	250	252	489	539	481
El Salvador	377	367	370	621	670	675
Guatemala	838	763	713	1,357	1,419	1,182
Honduras	561	694	909	954	1,366	2,012
Nicaragua	500	500	500	1,000	1,000	1,000
Panama	100	100	100	180	180	180
REGION TOTAL	2,641	2,674	2,844	4,601	5,174	5,530
CARIBBEAN						
Dominican Rep.	1,413	1,590	1,660	2,796	3,176	3,312
Jamaica and Dep	547	547	547	1,212	1,212	1,212
REGION TOTAL	1,960	2,137	2,207	4,008	4,388	4,524
Morocco	34	35	35	79	88	88
OTHER AFRICA						
Angola	3,200	3,200	3,200	3,200	3,200	3,200
Ethiopia	1,500	1,500	1,500	1,725	1,750	1,750
Ghana	2,805	3,160	3,230	1,024	1,464	1,700
Kenya	7,600	5,500	5,500	8,492	5,920	5,920
Madagascar	750	750	750	1,200	1,200	1,200
Malawi	16,500	16,600	16,800	19,835	21,818	23,000
Mozambique	1,270	1,270	1,270	1,350	1,350	1,350
Nigeria	1,500	1,100	1,100	1,752	1,752	1,752
South Africa	20,460	20,465	20,500	34,050	24,760	34,680
Tanzania	18,218	18,218	18,218	13,000	11,000	11,000
Uganda	1,350	2,150	2,150	1,200	2,000	2,000
Zaire	880	880	880	1,400	1,400	1,400
Zambia	2,850	2,850	2,850	3,500	3,500	3,500
Zimbabwe	57,660	59,425	66,500	129,960	133,866	163,000
REGION TOTAL	136,543	137,068	144,448	221,688	214,980	255,452
=====						
June 1991	Production Estimates and Crop Assessment Division, FAS, USDA					

TABLE 11 (Continued)

FLUE CURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
-----HECTARES-----METRIC TONS-----						
OTHER ASIA						
Bangladesh	12,000	12,000	12,000	13,000	13,000	13,000
Burma	5,800	5,800	5,800	13,200	13,200	13,200
Cambodia	2,600	2,600	2,600	1,200	1,200	1,200
China	1,510,000	1,400,000	1,400,000	2,404,776	2,260,000	2,260,000
India	105,470	88,600	103,342	116,210	100,840	109,710
Indonesia	64,000	75,500	79,000	42,300	49,980	52,450
Japan	19,752	19,660	20,016	46,556	50,540	47,700
Korea, North	15,100	15,100	15,100	18,400	18,400	18,400
Korea, South	22,329	22,595	21,315	54,020	46,037	49,500
Laos	1,150	1,150	1,150	1,025	1,025	1,025
Malaysia	12,311	10,168	15,000	13,637	10,517	10,400
Pakistan	10,971	11,650	11,650	23,790	23,300	23,300
Philippines	29,000	29,300	29,600	40,684	43,800	44,000
Sri Lanka	6,117	6,117	6,117	4,909	4,909	4,909
Taiwan	8,019	7,941	7,755	18,986	19,131	18,800
Thailand	23,373	24,775	26,000	29,684	32,500	33,500
Vietnam	12,000	12,000	12,000	9,800	9,800	9,800
REGION TOTAL	1,859,992	1,744,956	1,768,445	2,852,177	2,698,179	2,710,894

MIDDLE EAST						
Iran	2,750	2,750	2,750	5,300	5,300	5,300
Jordan	2,931	2,953	2,953	2,827	2,800	2,800
Syria	1,769	1,158	1,900	3,501	2,828	3,800
Turkey	821	850	850	1,812	2,000	2,000
Yemen	3,300	3,300	3,300	5,720	5,720	5,720
REGION TOTAL	11,571	11,011	11,753	19,160	18,648	19,620

EUROPEAN COMMUNITY						
France	2,650	2,601	2,800	5,425	5,152	5,485
Germany	1,861	1,707	1,710	2,507	2,397	2,400
Greece	3,597	7,600	7,500	9,400	26,559	25,000
Italy	21,850	25,000	24,000	36,685	52,000	50,000
Portugal	1,612	1,838	2,000	4,022	4,350	4,733
Spain	10,500	13,700	13,800	21,300	27,000	27,600
REGION TOTAL	42,070	52,446	51,810	79,339	117,458	115,218

EAST EUROPE						
Bulgaria	9,000	7,200	7,500	8,200	10,200	12,000
Czechoslovakia	3,000	3,000	3,000	4,400	4,000	4,400
Hungary	5,100	5,150	5,400	6,956	8,484	10,160
Poland	13,531	13,500	13,500	24,000	24,000	24,000
Romania	6,900	3,370	3,750	5,175	2,680	3,100
Yugoslavia	12,000	16,000	16,000	17,205	17,760	20,646
REGION TOTAL	49,531	48,220	49,150	65,936	67,124	74,306

OCEANIA						
Australia	4,771	4,727	4,700	13,296	13,327	13,500
New Zealand	583	583	583	1,520	1,520	1,520
REGION TOTAL	5,354	5,310	5,283	14,816	14,847	15,020

OTHER 1/	2,983	2,983	2,983	2,394	2,394	2,394

WORLD	2,518,731	2,408,754	2,442,077	4,099,237	4,004,239	4,028,291

1/ Includes Guyana, Haiti, Trinidad & Tobago, Benin, Mali, Mauritius, Reunion, Mali, Sierra Leone, and Cyprus.

June 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 12

BURLEY TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
	-----HECTARES-----			-----METRIC TONS-----		
NORTH AMERICA						
Mexico	13,584	10,917	10,780	26,180	18,013	19,490
United States	98,967	109,555	122,308	218,891	270,488	294,838
REGION TOTAL	112,551	120,472	133,088	245,071	288,501	314,328
SOUTH AMERICA						
Argentina	13,100	12,200	16,850	20,190	17,450	27,300
Brazil	37,000	35,000	34,000	59,000	57,000	55,000
Chile	2,154	2,531	2,890	7,629	8,639	10,050
Colombia	1,978	2,481	2,569	2,877	3,870	4,038
Ecuador	700	700	700	1,700	1,700	1,700
Paraguay	40	65	65	45	50	50
Peru	400	400	400	380	380	380
Uruguay	65	65	65	50	50	50
Venezuela	2,920	2,915	2,790	5,140	5,085	4,423
REGION TOTAL	58,357	56,357	60,329	97,011	94,224	102,991
CENTRAL AMERICA						
Costa Rica	148	150	119	266	236	189
El Salvador	167	195	190	349	368	350
Guatemala	5,278	5,191	5,039	10,086	8,824	8,480
Honduras	1,300	1,217	1,148	1,729	1,572	1,592
Nicaragua	1,150	1,150	1,150	2,300	2,300	2,300
Panama	380	380	380	1,000	1,000	1,000
REGION TOTAL	8,423	8,283	8,026	15,730	14,300	13,911
DOMINICAN REP.	962	1,075	1,090	1,641	2,091	2,400
NORTH AFRICA						
Libya	360	360	360	859	859	859
Morocco	5,323	5,700	5,700	6,030	6,800	6,800
Tunisia	4,950	5,000	5,000	4,497	5,000	5,000
REGION TOTAL	10,633	11,060	11,060	11,386	12,659	12,659
OTHER AFRICA						
Angola	250	250	250	200	200	200
Kenya	235	250	250	288	278	278
Madagascar	2,150	2,150	2,150	1,545	1,545	1,545
Malawi	52,000	53,000	58,000	61,212	64,019	71,000
Mozambique	950	950	950	1,150	1,150	1,150
South Africa	285	109	125	174	113	116
Swaziland	100	100	100	100	100	100
Tanzania	200	200	200	55	55	55
Zaire	650	650	650	660	660	660
Zambia	650	650	650	800	800	800
Zimbabwe	2,684	3,267	4,100	5,207	5,893	7,200
REGION TOTAL	60,154	61,576	67,425	71,391	74,813	83,104
June 1991	Production Estimates and Crop Assessment Division, FAS, USDA					

Table 12 (Continued)

BURLEY TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
	-----HECTARES-----			-----METRIC TONS-----		
OTHER ASIA						
Bangladesh	350	350	350	280	280	280
China	41,400	43,000	43,000	55,000	60,000	60,000
India	2,865	8,300	13,360	2,560	8,200	12,700
Indonesia	35	40	50	44	50	70
Japan	9,040	8,560	8,727	23,695	25,785	23,000
Korea, South	8,656	8,744	9,251	24,402	20,176	22,000
Malaysia	170	320	400	240	480	600
Pakistan	270	384	384	530	750	750
Philippines	9,000	8,500	9,200	19,300	17,260	19,000
Sri Lanka	843	843	843	1,347	1,347	1,347
Thailand	6,843	8,200	8,900	16,765	20,500	23,000
REGION TOTAL	79,472	87,241	94,465	144,163	154,828	162,747
MIDDLE EAST						
Syria	1,579	1,471	1,800	3,105	3,492	3,600
Turkey	52	60	60	116	140	140
REGION TOTAL	1,631	1,531	1,860	3,221	3,632	3,740
EUROPEAN COMMUNITY						
France	1,190	1,395	1,500	3,098	3,780	3,789
Germany	3,130	2,614	2,620	5,926	5,230	5,230
Greece	1,732	1,800	1,950	4,600	4,274	5,650
Italy	12,960	18,400	23,600	39,134	55,500	70,000
Portugal	464	419	450	1,450	1,223	1,315
Spain	16,000	9,200	9,200	23,200	15,600	15,500
REGION TOTAL	35,476	33,828	39,320	77,408	85,607	101,484
Switzerland	675	671	660	1,620	1,265	1,350
EAST EUROPE						
Bulgaria	3,500	3,400	3,600	4,100	4,200	5,400
Czechoslovakia	750	750	750	1,100	1,000	1,100
Hungary	130	120	150	199	200	257
Poland	2,347	2,400	2,400	3,500	3,800	3,800
Romania	8,600	4,200	4,400	8,170	4,175	4,200
Yugoslavia	3,000	2,000	3,000	4,995	3,330	4,995
REGION TOTAL	18,327	12,870	14,300	22,064	16,705	19,752
New Zealand	17	17	17	30	30	30
OTHER 1/	736	636	726	845	868	857
WORLD	387,414	395,617	432,366	691,581	749,523	819,353
=====						
1/ Includes Haiti, Austria and Ghana.						

June 1991

Production Estimates and Crop Assessment Division

TABLE 13

DARK AIR AND SUN CURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
	-----HECTARES-----			-----METRIC TONS-----		
NORTH AMERICA						
Canada	446	410	400	1,014	925	880
United States	1,434	1,409	1,822	2,963	3,469	4,173
REGION TOTAL	1,880	1,819	2,222	3,977	4,394	5,053
SOUTH AMERICA						
Argentina	9,800	6,800	7,300	10,950	5,640	6,500
Bolivia	1,250	1,250	1,250	1,250	1,250	1,250
Brazil	76,000	76,000	76,000	71,000	62,000	71,000
Chile	67	102	79	244	477	280
Colombia	12,662	12,742	13,170	19,226	20,330	21,235
Ecuador	325	325	325	450	450	450
Paraguay	2,700	3,000	3,000	3,500	6,000	8,000
Peru	800	800	800	800	800	800
REGION TOTAL	103,604	101,019	101,924	107,420	96,947	109,515
Dominican Rep.	24,636	12,165	15,700	23,632	9,818	19,600
NORTH AFRICA						
Algeria	2,600	2,700	2,700	4,800	5,000	5,000
Libya	300	300	300	533	533	533
Morocco	126	100	100	442	400	400
Tunisia	505	500	500	1,113	650	650
REGION TOTAL	3,531	3,600	3,600	6,888	6,583	6,583
OTHER AFRICA						
Angola	500	500	500	500	500	500
Burundi	2,000	2,000	2,000	1,600	1,600	1,600
Congo	2,200	2,200	2,200	750	750	750
Cote D' Ivoire	10,000	10,000	10,000	2,490	2,490	2,490
Madagascar	1,000	1,000	1,000	1,300	1,300	1,300
Malawi	2,640	4,660	2,800	372	1,610	800
Mali	333	333	333	183	183	183
Mozambique	400	400	400	230	230	230
Nigeria	1,200	1,200	1,200	1,070	1,070	1,070
South Africa	2,479	2,865	2,200	3,700	3,450	3,040
Swaziland	100	100	100	100	100	100
Togo	2,000	2,000	2,000	1,000	1,000	1,000
Zaire	450	450	450	532	532	532
REGION TOTAL	25,302	27,708	25,183	13,827	14,815	13,595
June 1991	Production Estimates and Crop Assessment Division, FAS, USDA					

TABLE 13 (Continued)

DARK AIR AND SUN CURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
-----HECTARES-----METRIC TONS-----						
OTHER ASIA						
Bangladesh	21,515	21,515	21,515	19,685	19,685	19,685
Burma	49,200	49,200	49,200	31,800	31,800	31,800
Cambodia	6,400	6,400	6,400	3,800	3,800	3,800
China	140,000	140,000	140,000	291,427	295,000	295,000
India	262,165	321,400	259,748	363,530	451,360	381,590
Indonesia	149,894	147,100	153,200	84,170	83,850	85,800
Korea, North	15,100	15,100	15,100	18,400	18,400	18,400
Laos	2,850	2,850	2,850	1,975	1,975	1,975
Pakistan	19,143	18,000	18,000	23,870	22,500	22,500
Sri Lanka	1,726	1,726	1,726	1,654	1,654	1,654
Vietnam	20,000	20,000	20,000	18,200	18,200	18,200
REGION TOTAL	687,993	743,291	687,739	858,511	948,224	880,404

MIDDLE EAST						
Iran	4,780	4,780	4,780	7,200	7,200	7,200
Oman	1,800	1,800	1,800	2,000	2,000	2,000
United Arab Em.	350	350	350	2,000	2,000	2,000
REGION TOTAL	6,930	6,930	6,930	11,200	11,200	11,200

EUROPEAN COMMUNITY						
France	7,573	6,708	6,400	20,693	19,363	17,299
Germany	658	280	280	1130	470	470
Italy	41,654	42,700	36,000	91,536	81,100	68,400
REGION TOTAL	49,885	49,688	42,680	113,359	100,933	86,169

EAST EUROPE						
Albania	24,000	24,000	24,000	15,000	15,000	15,000
Poland	9,305	10,000	10,000	20,300	22,000	22,000
Romania	8,600	4,235	5,050	6,015	3,160	4,500
REGION TOTAL	41,905	38,235	39,050	41,315	40,160	41,500

OTHERS 1/	981	786	731	799	765	769

WORLD	946,647	985,241	925,759	1,180,928	1,233,839	1,174,388

1/ Includes Solomon Is., Uruguay, Panama, Haiti, Ghana, St. Vincent and Benin.

June 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 14

LIGHT AIR CURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
	-----HECTARES-----			-----METRIC TONS-----		
NORTH AMERICA						
Mexico	7,585	2,931	1,990	13,770	4,090	3,230
United States	4,577	4,332	4,089	6,941	7,304	6,532
REGION TOTAL	12,162	7,263	6,079	20,711	11,394	9,762
SOUTH AMERICA						
Argentina	700	620	650	1,047	855	900
Brazil	8,000	8,000	10,000	13,000	13,000	15,000
Colombia	1,008	1,023	850	1,527	1,558	1,300
Peru	100	100	100	100	100	100
REGION TOTAL	9,808	9,743	11,600	15,674	15,513	17,300
CENTRAL AMERICA						
Guatemala	181	214	210	257	244	272
Honduras	108	126	200	163	181	310
Nicaragua	140	140	140	300	300	300
REGION TOTAL	429	480	550	720	725	882
OTHER AFRICA						
Cameroon	810	810	810	600	600	600
Congo	1,800	1,800	1,800	1,050	1,050	1,050
Madagascar	2,000	2,000	2,000	1,455	1,455	1,455
Niger	1,000	1,000	1,000	930	930	930
Nigeria	5,000	5,000	5,000	6,401	6,401	6,401
Reunion	100	100	100	100	100	100
South Africa	300	438	350	450	250	250
Zaire	370	370	370	532	532	532
REGION TOTAL	11,380	11,518	11,430	11,518	11,318	11,318
OTHER ASIA						
Bangladesh	6,135	6,135	6,135	6,580	6,580	6,580
India	6,500	2,800	3,550	10,500	4,000	6,000
Japan	1,869	1,744	1,668	4,146	4,217	3,900
Korea	6,800	6,800	6,800	9,200	9,200	9,200
Pakistan	1,511	1,090	1,090	4,760	3,370	3,370
Sri Lanka	3,479	3,479	3,479	1,090	1,090	1,090
REGION TOTAL	26,294	22,048	22,722	36,276	28,457	30,140
MIDDLE EAST						
Syria	245	245	500	107	257	500
EUROPEAN COMMUNITY						
Germany	1,306	1,279	1,270	2,901	3,050	3,050
Italy	1,635	3,000	3,000	2,248	4,000	4,000
REGION TOTAL	2,941	4,279	4,270	5,149	7,050	7,050
=====						
WORLD	63,259	55,576	57,151	90,155	74,714	76,952
=====						
June 1991	Production Estimates and Crop Assessment Division, FAS, USDA					

TABLE 15

DARK FIRE CURED TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
	-----HECTARES-----			-----METRIC TONS-----		
NORTH AMERICA						
Mexico	1,225	800	700	1,130	960	950
United States	6,111	6,251	6,518	13,119	15,866	15,196
REGION TOTAL	7,336	7,051	7,218	14,249	16,826	16,146
SOUTH AMERICA						
Argentina	48	35	27	32	34	40
OTHER AFRICA						
Benin	66	66	66	133	133	133
Ghana	395	315	190	148	139	100
Kenya	2,500	3,055	3,055	2,730	3,712	3,712
Liberia	10	10	10	10	10	10
Malawi	17,900	25,400	26,000	4,900	14,000	14,000
Mali	333	333	333	183	183	183
Mozambique	80	80	80	170	170	170
Sierra Leone	198	198	198	200	200	200
Tanzania	2,832	2,832	2,832	2,000	3,000	3,000
Togo	2,000	2,000	2,000	1,000	1,000	1,000
Zaire	1,350	1,350	1,350	986	986	986
REGION TOTAL	27,664	35,639	36,114	12,460	23,533	23,494
EUROPEAN COMMUNITY						
Italy	3,692	5,000	4,500	5,865	8,400	7,600
EAST EUROPE						
Poland	4,113	4,100	4,100	12,000	12,000	12,000
=====						
WORLD	42,853	51,825	51,959	44,606	60,793	59,280
=====						
June 1991	Production Estimates and Crop Assessment Division, FAS, USDA					

TABLE 16

ORIENTAL TOBACCO
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
-----HECTARES-----METRIC TONS-----						
NORTH, SOUTH & Cent America						
Mexico	0	310	250	0	210	440
Chile	100	90	85	161	148	123
Costa Rica	421	430	355	790	882	606
Guatemala	143	76	143	166	81	152
Honduras	22	34	27	22	27	24
Panama	40	40	40	9	9	9
REGION TOTAL	726	980	900	1148	1357	1354

Libya	240	240	240	58	58	58

OTHER AFRICA						
Ethiopia	1,500	1,500	1,500	1,725	1,750	1,750
Malawi	600	450	1,100	296	210	500
South Africa	1,015	964	1,000	575	533	525
Zimbabwe	200	232	270	38	44	50
REGION TOTAL	3,315	3,146	3,870	2,634	2,537	2,825

OTHER ASIA						
China	3,100	3,250	3,250	6,150	6,500	6,500
Pakistan	11,321	11,000	11,000	21,000	20,500	20,500
Philippines	150	30	20	146	30	20
Thailand	8,500	14,330	12,300	8,791	15,055	11,300
REGION TOTAL	23,071	28,610	26,570	36,087	42,085	38,320

MIDDLE EAST						
Cyprus	17	17	17	11	11	11
Iran	10,470	10,470	10,470	12,500	12,500	12,500
Iraq	2,000	2,000	2,000	2,180	2,180	2,180
Israel	400	200	0	280	120	0
Lebanon	3,750	3,750	3,750	5,000	5,000	5,000
Syria	6,552	9,883	11,450	4,146	6,430	9,113
Turkey	283,626	300,000	260,000	267,563	280,000	240,000
REGION TOTAL	306,815	326,320	287,687	291,680	306,241	268,804

EUROPEAN COMMUNITY						
Greece	76,142	67,059	64,000	101,750	93,919	89,500
Italy	13,374	11,900	11,900	21,848	20,000	20,000
REGION TOTAL	89,516	78,959	75,900	123,598	113,919	109,500

EAST EUROPE						
Bulgaria	60,161	42,291	50,000	63,237	52,458	65,000
Romania	10,300	5,040	5,800	8,140	4,185	4,700
Yugoslavia	34,000	27,000	31,000	41,070	25,530	36,630
REGION TOTAL	104,461	74,331	86,800	112,447	82,173	106,330

USSR	113,400	103,400	103,400	233,200	225,000	225,000

WORLD	641,544	615,986	585,367	800,852	773,370	752,191
=====						
June 1991	Production Estimates and Crop Assessment Division, FAS, USDA					

TABLE 17
DARK AIR CURED TOBACCO, CIGAR
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
	-----HECTARES-----			-----METRIC TONS-----		
NORTH AMERICA						
Canada	54	50	40	103	100	90
Mexico	3,623	0	1,270	4,400	0	2,370
United States	5,350	6,311	6,235	11,573	13,905	13,472
REGION TOTAL	9,027	6,361	7,545	16,076	14,005	15,932
SOUTH AMERICA						
Brazil	6,000	6,000	6,000	9,000	8,000	9,000
Colombia	415	387	480	601	600	720
Ecuador	125	125	125	125	125	125
REGION TOTAL	6,540	6,512	6,605	9,726	8,725	9,845
CENTRAL AMERICA						
Honduras	540	570	580	1,378	1,459	1,473
Nicaragua	450	450	450	950	950	950
Panama	180	180	180	95	95	95
REGION TOTAL	1,170	1,200	1,210	2,423	2,504	2,518
CARIBBEAN						
Cuba	50,000	50,000	50,000	44,000	44,000	44,000
Jamaica and Dep	628	628	628	1,127	1,127	1,127
REGION TOTAL	50,628	50,628	50,628	45,127	45,127	45,127
OTHER AFRICA						
Cameroon	2,590	2,590	2,590	4,900	4,900	4,900
Cent. Afr. Rep.	750	750	750	650	650	650
Uganda	2,150	2,150	2,150	2,000	2,000	2,000
REGION TOTAL	5,490	5,490	5,490	7,550	7,550	7,550
OTHER ASIA						
Bangladesh	500	500	500	455	455	455
China	32,000	31,000	31,000	73,000	70,800	70,800
Indonesia	13,600	13,750	14,000	20,400	20,600	20,800
Philippines	12,000	12,000	14,000	13,175	11,230	15,400
Thailand	18,000	16,360	15,800	9,540	8,180	7,900
REGION TOTAL	76,100	73,610	75,300	116,570	111,265	115,355
EUROPEAN COMMUNITY						
Belgium-Lux	438	461	500	1,800	1,553	2,000
Spain	830	550	550	915	900	880
REGION TOTAL	1,268	1,011	1,050	2,715	2,453	2,880
EAST EUROPE						
Hungary	3,852	3,430	4,450	5,714	5,662	8,399
Poland	133	150	150	200	250	250
REGION TOTAL	3,985	3,580	4,600	5,914	5,912	8,649
OTHER 1/	295	336	312	290	339	305
WORLD	154,503	148,728	152,740	206,391	197,880	208,161

1/ Includes Costa Rica, St. Vincent, Chad and Turkey.

June 1991

Production Estimates and Crop Assessment Division, FAS, USDA

WORLD CITRUS PRODUCTION

Citrus production for 1990/91 in selected countries is estimated at 48.6 million tons, up from 48.0 million in 1989/90. Production is estimated higher for the United States, Mexico, Spain, Egypt, Morocco, Turkey, Australia, Argentina, Chile, and South Africa, and lower or unchanged in Brazil, Japan, Greece, Italy, Cyprus, Israel, and the Gaza strip.

TRENDS IN CITRUS PRODUCTION

Orange production in 1990/91 is estimated up slightly to 33.6 million tons from 33.4 million in 1989/90, but 2.6 million below the 1988/89 record due to smaller crops in the United States and Brazil. Tangerine production is estimated at 6.3 million tons in 1990/91 up 2 percent from last year's 6.2 million ton crop. Grapefruit production for 1990/91 is estimated at 3.5 million tons, up 7 percent from 1989/90, but down 428,000 tons from the 1988/89 record of over 3.9 million. Lemon production is estimated at 3.2 million tons unchanged from 1989/90, but down about one half million tons from 1986/87 due largely to reduced production in the United States and Italy. Other citrus production is estimated at 1.9 million tons for 1990/91, down slightly from the 1989/90 record of 2.0 million.

NORTHERN HEMISPHERE

Northern Hemisphere citrus production for 1990/91 is estimated at 31.8 million tons compared with 34.0 million estimated in December and 31.4 million produced in 1989/90. The major changes from the December projections are drought losses in Israel and Gaza and losses from the California freeze.

Citrus production in the United States is projected at 10.2 million tons, up 4 percent from 1989/90 when a freeze in Florida reduced the total crop. The 1990/91 output is down 16 percent from the 12.3 million tons projected in December 1990, largely because of the December 1990 California freeze. California orange production was cut by nearly 60 percent, lemon production was down 18 percent, and tangerine output down 50 percent from pre-freeze estimates. Total orange production for 1990/91 is estimated at 7.3 million tons compared with 9.1 million before the freeze and 7.1 million in 1989/90. The grapefruit crop is estimated at 2.0 million tons compared with the pre-freeze level of 2.2 million and 1.8 million last year. Lemon production is estimated at 617,000 tons compared with 693,000 projected before the freeze and 640,000 in 1989/90. Tangerine output is estimated at 259,000 tons compared with 308,000 before the freeze and 269,000 in 1989/90.

Spanish citrus production is estimated at 4.7 million tons for 1990/91, up from 4.6 million estimated in December and 4.2 million in 1989/90. Favorable weather, adequate irrigation, and new tangerine orchards coming into production were the main factors in this years record crop estimate. In Italy, production is estimated at 3.0 million tons, up 3.8 percent from the December projection, but 8 percent below 1989/90 due to a drought during 1990. Greek production for 1990/91 is estimated at 1.1 million tons, unchanged from the December projection, but down 11 percent from last year because of a drought.

Japanese citrus production, almost all tangerines, is estimated at 2.2 million tons, down 2 percent from the December projection and 16 percent below 1989/90. Production is down this year largely because this is an "off-year" in the alternate bearing cycle of Japanese Mikan tangerines. The Japanese have reached the end of their three year subsidized reduction in Mikan tangerine harvested area. Future tangerine production levels are expected to be at or near current levels.

Morocco citrus production is estimated at 1.3 million tons, unchanged from the December projection but up 24 percent from the 1989/90 crop which was reduced because of heavy pruning and harvest delays. In Israel, 1990/91 citrus production is estimated at only 1.1 million tons, down 23 percent from the December estimate due to continued dry weather, reduced supplies of water for irrigation, and a shortage of labor for harvest. Water shortages have also caused the citrus crop in Gaza to fall to 120,000 tons from 148,000 estimated in December.

SOUTHERN HEMISPHERE

Southern Hemisphere citrus production for the 1990/91 crop is estimated at 16.8 million tons, up 1 percent from last year's 16.6 million ton crop. Orange production is estimated at 14.2 million tons, up slightly from the 14.1 million 1989/90 crop. Tangerines are estimated at 906,000 tons, down 3 percent from last year. Grapefruit is estimated at 397,000 tons, up almost 5 percent from 1989/90. Lemon production is estimated at 710,000 tons, up over 10 percent from last year, while other citrus is estimated at 590,000 tons, down slightly from 1989/90.

Brazilian citrus production for 1990/91 is estimated at 13.2 million tons, down slightly from last year. Orange production is forecast at 12.0 million tons, unchanged from the 1989/90 level. The 1990/91 orange crop was adversely affected by heat and drought in Sao Paulo in November directly following the flowering period. However, weather in early 1991 was favorable. Farmers, in reaction to low expected profits, have reduced grove care to cut costs. This reaction is expected to keep future crops well below potential 15 million ton harvests. Tangerine production for 1990/91 is estimated at 570,000 tons, down from the recently revised 1989/90 crop of 592,000 tons. (The 1989/90 tangerine crop was revised upward by 23 percent). Production of other citrus, including limes, is estimated at 590,000 tons, down slightly from last year's crop.

Argentine citrus production is estimated at 1.6 million tons for 1990/91, unchanged from last year's revised production. Orange production is estimated at 760,000 tons, up 10,000 from 1989/90 due to improved weather. Lemon production is estimated at 430,000 tons compared with a revised 380,000 tons for 1989/90. The sharp rise this year was due to very good weather in Tucuman province where most lemons are grown. The grapefruit crop is estimated at 180,000 tons, down 5 percent from last year, primarily because of lower production in Misiones province where older trees have not been replaced. These older trees produce white pulp fruit which has a weak market. Tangerine production is forecast at 240,000 tons, down 10,000 tons from 1989/90.

Uruguay's citrus production for 1990/91 is projected at 215,000 tons, up 10,000 from last year's revised crop of 205,000 tons, due to continued good weather and new trees coming into production.

Chilean citrus production is projected at 192,000 tons, up slightly from 189,000 tons in 1989/90. Orange production is estimated at 116,000 tons, up 1,000 tons from last year, while lemon production is up 2,000 tons at 76,000.

South Africa's 1990/91 citrus crop is estimated at 885,000 tons, up from a revised 1989/90 crop of 863,000 tons. Orange production is projected at 685,000 tons, down from last year's 697,000 because of unusually warm weather in the April-May period. Grapefruit production is projected at 135,000 tons, up from the 1989/90 hail damaged crop of 111,000 tons. Lemon production in 1990/91 is projected at 65,000 tons, up from 55,000 for the 1989/90 crop due to new trees coming into production.

Australia's 1990/91 citrus crop is projected to reach 668,000 tons, up from 584,000 last year, when the crop was damaged by heavy rain, flooding, and hail. Orange production for 1990/91 is projected at 559,000 tons, a new record for Australia, 16 percent above the weather damaged 1989/90 crop of 480,000. Since 1981 total bearing trees have increased 18 percent with total trees up 28 percent. With normal weather, orange production should continue to expand.

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TABLE 18

COMMERCIAL CITRUS PRODUCTION
(1,000 METRIC TONS)

	1986/87	1987/88	1988/89	1989/90	1990/91 1/
CUBA					
Oranges	496	508	520	520	520
Tangerines	25	25	26	30	30
Grapefruit	250	285	385	400	400
Citrus, other	64	80	62	70	70
TOTAL	835	898	993	1,020	1,020
CYPRUS 2/					
Oranges	204	138	170	223	192
Tangerines	5	6	11	12	14
Grapefruit	111	96	115	118	106
Lemons	54	46	63	66	59
TOTAL	374	286	359	419	371
EGYPT 2/					
Oranges	1,235	1,387	1,199	1,397	1,400
Tangerines	117	134	151	170	180
Grapefruit	2	2	2	2	2
Lemons	1	2	2	2	2
Citrus, other	150	138	190	240	240
TOTAL	1,505	1,663	1,544	1,811	1,824
GAZA STRIP					
Oranges	151	83	98	160	104
Grapefruit	14	10	14	12	9
Lemons	15	12	13	13	7
TOTAL	180	105	125	185	120
GREECE					
Oranges	881	462	770	932	819
Tangerines	68	49	69	75	74
Grapefruit	6	5	6	7	7
Lemons	168	89	170	189	169
Citrus, other	4	3	4	4	4
TOTAL	1,127	608	1,019	1,207	1,073
ISRAEL					
Oranges	815	627	546	877	600
Tangerines	158	122	90	127	70
Grapefruit	392	314	353	394	365
Lemons	69	47	37	46	35
Citrus, other	13	14	16	25	20
TOTAL	1,447	1,124	1,042	1,469	1,090
ITALY					
Oranges	2,424	1,343	2,170	2,071	1,850
Tangerines	531	333	411	479	480
Grapefruit	8	3	7	8	8
Lemons	813	592	708	667	641
Citrus, other	41	42	18	38	30
TOTAL	3,817	2,313	3,314	3,263	3,009
JAPAN					
Oranges	62	67	58	54	49
Tangerines	2,542	2,941	2,387	2,375	1,988
Lemons	1	2	2	2	2
Citrus, other	279	288	227	201	175
TOTAL	2,884	3,298	2,674	2,632	2,214

FOOTNOTES AT END OF TABLE

CONTINUED

June 1991

Production Estimates and Crop Assessment Division, FAS, USDA

COMMERCIAL CITRUS PRODUCTION
(1,000 METRIC TONS)

CONTINUED

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 18 (Continued)

COMMERCIAL CITRUS PRODUCTION
(1,000 METRIC TONS)

	1986/87	1987/88	1988/89	1989/90	1/ 1990/91
BRAZIL					
Oranges	10,650	10,400	14,150	11,950	11,950
Tangerines	479	453	570	592	570
Grapefruit	29	24	25	25	25
Lemons	35	50	54	53	53
Citrus, other	396	512	571	592	590
TOTAL	11,589	11,439	15,370	13,212	13,188
CHILE					
Oranges	95	120	115	115	116
Lemons	64	80	85	74	76
TOTAL	159	200	200	189	192
SOUTH AFRICA, REPUBLIC OF					
Oranges	577	681	629	697	685
Grapefruit	115	134	135	111	135
Lemons	63	65	61	55	65
TOTAL	755	880	825	863	885
URUGUAY					
Oranges	79	68	70	82	85
Tangerines	45	35	37	49	50
Grapefruit	8	8	8	23	25
Lemons	52	54	54	51	55
TOTAL	184	165	169	205	215
:					
TOTAL SOUTHERN HEMISPHERE					
Oranges	12,497	12,313	16,128	14,074	14,155
Tangerines	809	810	937	934	906
Grapefruit	374	372	356	379	397
Lemons	710	801	636	644	710
Citrus, other	396	512	571	592	590
TOTAL	14,786	14,808	18,628	16,623	16,758
:					
GRAND TOTAL					
Oranges	31,029	30,806	36,149	33,400	33,581
Tangerines	6,510	6,830	6,601	6,197	6,334
Grapefruit	3,646	3,782	3,949	3,283	3,521
Lemons	3,709	3,312	3,383	3,188	3,177
Citrus, other	1,633	1,838	1,850	1,980	1,942
TOTAL	46,527	46,568	51,932	48,048	48,555

1/ June 1991 Estimate unless otherwise noted. 2/ Estimate previously reported.

June 1991 Production Estimates and Crop Assessment Division, FAS, USDA

WORLD COFFEE PRODUCTION

The first forecast of 1991/92 world green coffee production is 99.9 million 60-kilogram bags, up slightly from the 99.7 million-bag harvest last year, but 3 percent below the 1987/88 record level of 103.1 million bags. All regions showed increases over 1990/91 except for South America, which was down 4 percent. The South American region accounts for 48 percent of the 1991/92 world forecast.

Brazil, the world's largest producer, is forecast to harvest a crop of 28.0 million bags in 1991/92, 10 percent below last season, and 11.6 million below the 1961/62 record. Normal rainfall and distribution during the current (September 1990 - April 1991) rainy season have contributed to the satisfactory development of coffee cherries in most coffee producing areas. The forecast is an upward revision of a February 1991 forecast of 25 million bags. Brazil has the potential for a crop exceeding 43 million bags from a coffee population estimated at more than 4 billion trees. The maximum potential could only be achieved, if the majority of the coffee trees in all producing states were on the same production cycle.

Brazil's total 1991/92 area planted in coffee trees is estimated to have increased from 3.48 million hectares to 3.5 million. Almost all of the 20,000 hectares of newly planted coffee seedlings are located in the state of Minas Gerais. Coffee tree density varies greatly according to old and revised planting technologies. The gradual change in planting technique that started 26 years ago increased the density from 900 to 5,000 coffee trees per hectare. The highest yields, 35 bags or more per thousand trees, are from the Caturra/Catuai variety planted on "Terra Roxa" soil in northern Parana, northeastern Sao Paulo, and southwest Minas Gerais.

For the 1991/92 season, coffee trees in Parana and Sao Paulo are on the "off-year" cycle while most coffee trees in Minas Gerais are on the "on-year" cycle. Current dissatisfaction with coffee prices are reflected by the poor or absence of plantation management in Parana and Sao Paulo.

In Colombia, coffee production in 1991/92 is forecast at a record 14.5 million bags, 4 percent above last year's crop and 1 percent above the previous record set in 1981/82. The projected increase is due to ongoing programs to replace older trees with high-yielding, disease-resistant varieties. Production has not fallen in response to low world coffee prices because the government has continued to guarantee growers attractive, subsidized prices for their coffee. Coffee production takes place on the slopes of the Central and Eastern Andean mountain ranges. It is mainly produced on small family farms. The soil in this region was formed from volcanic ash and is highly suitable for coffee production. In the late 1970's, Colombian coffee farmers began the process of substituting traditional arabica varieties for high yielding varieties, mainly Caturra. The traditional varieties are grown under shade, the new varieties in the sun. In the early 1980's a coffee rust resistant variety, Colombia, was introduced and by 1989/90 about 695,000 hectares or 63 percent of the total area was planted to this variety. Currently, three fourths of the total coffee area has been planted to the Colombia and Caturra varieties. The average number of trees per hectare for these varieties is 5,000. There are currently about 4 billion coffee trees planted on 1.2 million hectares. Although the campaign to reduce losses from rust have been largely successful, the insect "broca" is a serious problem, though not considered insurmountable.

In Indonesia, 1991/92 coffee production is forecast at 6.9 million bags, down 50,000 from the record set last year. Low world coffee prices continue to have a limited impact on the general level of production. The damaging effects of heavy rains in Lampung and southern Sumatra will be partially offset by new output from recent plantings. Throughout 1990, new exporters swelled the ranks in hopes of obtaining a share of the export quota from the Government of Indonesia, if and when the International Coffee Organization (ICO) export quotas are reinstated. This competition for exportable supplies resulted in artificially high domestic prices. Relatively low quality robusta coffee is produced by smallholders. However, coffee quality improvement programs appear to be successful, as exports of higher quality coffee have been on the increase.

In India, the 1991/92 forecast is 3.5 million bags, up 22 percent from last year but down 3 percent from the record set in 1988/89. Coffee plantations have benefited from an optimal distribution of rains from February through April 1991 in the three coffee producing states of southern India. Optimal weather has led to excellent spiking and foliage development this year. This is expected to more than offset the normal alternate year bearing tendency of the trees. There are 425 million coffee trees planted on 250,000 hectares in India. Small estates account for over 90 percent of the total plantations, but only half of the harvested area. High yielding varieties are now planted on over 85 percent of the Indian coffee area.

Mexican coffee production in 1991/92 is forecast at 4.6 million bags, 5 percent more than last year, but 17 percent below the record 1988/89 crop. The increase in the 1991/92 crop is due to some recovery of bearing trees partially damaged by the December 1989 freeze. Rising labor costs and reduced input utilization are expected to constrain any large increases in the near future. Ten percent of Mexico's coffee growers produce over 50 percent of the country's total coffee output. These producers continue to improve yields and obtain better returns than the small producers. Coffee grown in higher elevations, such as the central region of Chiapas and Veracruz, had good flowering. Growers report dry conditions along the Gulf of Mexico and Southern Pacific coasts which are stressing lower altitude coffee areas of Veracruz and Chiapas. The lack of rain has delayed tree flowering in these areas. Although alternative bearing years vary in Mexico, 1991/92 will be an "off-year" for production. Medium and large growers continue to implement cultural practices to control coffee rust and combat "broca." The total coffee tree population is estimated at 850 million trees on 620,000 hectares.

In Cote d'Ivoire, 1991/92 coffee production is forecast at 4.5 million bags, up 13 percent (500,000 bags) from the 1990/91 estimate but 26 percent less than the record crop of 6.1 million harvested in 1980/81. The projected increase for the upcoming season is due to favorable rainfall and an increasing number of pruned trees coming into production. However, financial problems resulting from low producer prices will moderate the increase in production. Area expansion and replanting also are expected to be adversely affected by marketing problems faced by coffee producers. Farm incomes are falling due to lower prices and higher labor costs. The coffee tree population in Cote d'Ivoire is 1.8 billion trees on 1.4 million hectares.

Coffee production in Guatemala for 1991/92 is forecast at a near record 3.4 million bags, up 6 percent from last year, but less than the 3.5 million produced in 1989/90. Increased yields based on the traditional upswing in the coffee production cycle and the maturation of new trees which were planted over the past several years are the cause for the larger forecast. Producers have replaced aging trees over the past several years with improved varieties (Catuai, Caturra, and Catimor). These trees are small and consequently more can be planted per hectare. These varieties will begin to bear fruit within two years of planting. Approximately 80 percent devaluation of the local currency in 1990 contributed to increased costs for production inputs. Because of low prices, many small producers have already reduced fertilizer utilization from two or three applications per year to only one. The principal production regions are the Pacific slopes of the Cordillera Volcano, the Central Highlands, and the Caribbean Mountain Chain. The average yields in Guatemala are comparatively low. Guatemala has a coffee tree population of 700 million on 250,000 hectares.

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TABLE 19

GREEN COFFEE: TOTAL PRODUCTION IN SELECTED COUNTRIES
 1988/89-1990/91, Estimates; 1991/92 Forecast 1/
 (IN THOUSANDS OF 60-KG BAGS) 2/

Region and Country	1988/89	1989/90	1990/91	1991/92
NORTH AMERICA				
Costa Rica	2,758	2,453	2,645	2,680
Cuba	450	475	480	480
Dominican Republic	726	756	608	725
El Salvador	1,492	2,787	2,230	2,500
Guatemala	3,022	3,472	3,250	3,440
Haiti	479	527	580	600
Honduras	1,635	1,928	1,663	1,665
Jamaica & Dep	14	19	26	30
Mexico	5,500	5,000	4,350	4,550
Nicaragua	714	742	450	500
Panama	200	220	260	260
Trinidad and Tobago	20	15	15	15
United States 3/	254	279	282	285
TOTAL	17,264	18,673	16,839	17,730
SOUTH AMERICA				
Bolivia	195	258	342	350
Brazil	25,000	26,000	31,000	28,000
Colombia	10,700	13,300	14,000	14,500
Ecuador	2,150	2,150	2,000	1,900
Guyana	5	5	5	5
Paraguay	410	430	340	400
Peru	1,400	1,400	1,150	1,300
Venezuela	1,127	1,075	843	1,100
TOTAL	40,987	44,618	49,680	47,555
AFRICA				
Angola	200	170	170	170
Benin	40	35	35	35
Burundi	600	515	550	550
Cameroon	1,760	1,428	1,175	970
Central African Rep.	355	300	350	350
Congo	25	25	25	25
Cote d'Ivoire	3,989	4,734	4,000	4,500
Equatorial Guinea	15	15	15	15
Ethiopia	2,900	3,000	3,000	3,000
Gabon	35	30	30	30
Ghana	17	17	35	35
Guinea	100	125	125	125
Kenya	1,960	1,740	1,400	1,600
Liberia	82	40	30	30
Madagascar	1,100	1,100	1,050	1,000
Malawi	72	95	90	90
Nigeria	90	95	90	90
Rwanda	671	493	660	660
Sierra Leone	92	100	100	100
Tanzania	957	851	830	820
Togo	300	300	300	300
Uganda	3,000	3,100	3,000	3,000
Zaire	1,750	2,000	1,695	1,640
Zambia	10	15	15	15
Zimbabwe	175	225	225	225
TOTAL	20,295	20,548	18,995	19,375

FOOTNOTES AT END OF TABLE

CONTINUED

June 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 19 (Continued)

GREEN COFFEE: TOTAL PRODUCTION IN SELECTED COUNTRIES
 1988/89-1990/91, ESTIMATES; 1991/92 FORECAST 1/
 (IN THOUSANDS OF 60-KG BAGS) 2/

Region and Country	1988/89	1989/90	1990/91	1991/92
ASIA				
India	3,590	2,000	2,880	3,500
Indonesia	6,750	6,900	6,950	6,900
Malaysia	75	75	75	75
Philippines	1,350	1,245	1,101	1,300
Sri Lanka	75	70	75	75
Thailand	1,025	800	900	1,000
Vietnam	922	985	1,200	1,350
Yemen	65	65	65	65
TOTAL	13,852	12,140	13,246	14,265
OCEANIA				
New Caledonia	6	5	5	5
Papua New Guinea	1,175	1,092	962	1,000
TOTAL	1,181	1,097	967	1,005
=====	=====	=====	=====	=====
WORLD TOTAL	93,579	97,076	99,727	99,930
=====	=====	=====	=====	=====

1/ Coffee marketing year begins about October in some countries
 and April or July in others.

2/ One bag = 132.276 pounds.

3/ Includes Puerto Rico and Hawaii.

NOTE: Production estimates for some countries include cross-
 border movements.

June 1991

Production Estimates and Crop Assessment Division, FAS, USDA

The agricultural sector of Paraguay employs nearly 50 percent of the country's labor force and provides 90 percent of Paraguayan export earnings. Soybeans and cotton are the two most important crops, as well as being the country's leading export items. The agricultural sector has grown in recent years due to an expansion of area under cultivation and changes in Paraguay's monetary and export policies to favor agricultural exports. The Agrarian Reform Movement, beginning in 1989, encouraged agricultural area expansion and land ownership. In addition, the government is moving toward the liberalization of the Paraguayan economic and export systems, resulting in increased official agricultural exports. Additionally, the elimination of the former two-tier exchange rate system removed a major export barrier.

CURRENT CROP ASSESSMENT AND 1991/92 OUTLOOK

Harvest prospects for Paraguay's 1990/91 summer crops, including soybeans and cotton, are poor due to adverse weather for the second consecutive year. The major growing region in southeastern Paraguay experienced prolonged hot, dry weather during the period when most crops were in the sensitive early development and reproductive phases. Compounding the unfavorable weather were reduced input use and planting delays caused by a lack of affordable financing at planting.

The outlook for the 1991/92 soybean and cotton crops will depend on the government's economic policies regarding credit availability, interest and exchange rates. Significant soybean area expansion and yield improvements are possible. However, yield prospects are limited by the lack of credit and the high cost of production inputs. The outlook for the 1991/92 wheat crop, which is currently being planted, is not good. Domestic prices remain low, due to competition from flour imports from Argentina. The low prices coupled with a lack of capital may dissuade farmers from planting their usual levels of wheat. Producers often rely on the government to establish an acceptable minimum support price and to provide adequate levels of affordable credit.

SOYBEANS

Paraguay is currently estimated to produce 1.3 million tons of soybeans, down from 1.4 million last year. The weather outlook for the 1990/91 crop was extremely favorable at the outset of the season. Abundant rains created favorable pre-planting conditions. The above-average soil moisture levels encouraged the formation of shallow root systems, as the roots spread out near the soil surface rather than going deeper to seek moisture. Starting in late December, hot, dry conditions occurred and continued until February, impacting flowering and early plant development. The shallow root systems left early and mid-season varieties susceptible to drought stress. Late season varieties were less effected, but will not offset the yield losses of the earlier varieties. Soybean yields reached the record level of 1.9 metric tons per hectare in 1988/89. Yields decreased to 1.6 MT/Ha in 1989/90 and are estimated at 1.5 MT/Ha this year.

Soybean production is well suited to the main agricultural region in southern Paraguay (east of the Paraguay river). The topography, climate, and soil type in this region are similar to the soybean growing areas of western Parana and western Rio Grande do Sul, Brazil. Soybeans are generally produced on a commercial level by medium and large scale farmers, with planting beginning in October and continuing through December. Harvesting of the soybean crop occurs from April to June, with nearly 25 percent of the soybean crop being double-cropped with wheat.

There is a potential for increases in soybean production. The additional use of fertilizers and pesticides could raise yields above the average national yield of 1.6 MT/Ha. However, a lack of affordable credit and the high costs of imported inputs limit that potential. The area planted to soybeans has more than doubled since 1983/84, and the potential for continued area expansion exists in the forests of eastern Paraguay. Soybean area reached record levels during the 1989/90 growing season, with the expansion of new lands into the crop cycle. The recent Agrarian Reform Movement resulted in a dramatic increase of land ownership, as the government has been under pressure by the landless rural population to open "surplus" land for settlement. Due to the limited availability of land tracts, land owners are forced to crop fields immediately after clearing them or risk losing their land. As a result, soybeans are frequently planted directly into poorly worked fields containing debris and forest residues.

In spite of reaching record planted area during the 1989/90 season, soybean production was limited. This was due to the adverse weather which occurred during the flowering period that greatly reduced yields. Many producers funded planting of the 1989/90 crop with their own resources. The economic liberalization which began in 1989 brought about a new agricultural credit situation with much less government participation and increased interest rates, making credit expensive and harder to obtain. However, the general consensus was that the credit constraints would be a short term problem, which encouraged producers to finance planting costs themselves. The poor harvest left many soybean farmers in a financially confined position. Producers hoped to regain cash flow with income generated by the 1990/91 wheat crop. However, extreme cold weather, frosts, and excessive precipitation devastated wheat yields and lowered production.

Following the poor 1989/90 soybean harvest and the low 1990/91 wheat crop, farmers entered the 1990/91 soybean planting season in serious financial trouble. Initially, concern existed over the lack of capital available for purchasing seed and inputs. Input use suffered a decline, however, seed arrived from Argentina in time for planting, offsetting potential area decreases.

COTTON AND COTTONSEED

The 1990/91 cotton crop is estimated at 1.0 million bales, unchanged from 1989/90. Cotton is produced throughout southeastern Paraguay and is the primary cash crop for the country's numerous subsistence farmers. Cottonseed is generated as a by-product of cotton production. Cotton producers employ hand labor and cultivate fields which are generally 3-4 hectares in size. A minor portion of the cotton crop is grown by the Mennonite community west of the Paraguay river in the Chaco region, where cotton is mechanically harvested. Planting begins in September and extends through November. Flowering begins in December, followed by a second flowering in March. Harvesting is concluded by mid-May.

The boll weevil is currently not a problem in Paraguay. However, there remains concern in the cotton sector regarding the proximity of the pest to Paraguay's border and main cotton producing areas. Paraguayan farmers produce high quality cotton, which brings a premium price on the world market. The cotton sector is largely controlled by the government. The government attempts to maintain the high quality of the crop due to its value as an export product as well as its importance as an income generator for subsistence farmers. The recent implementation of the Agrarian Reform Movement has led to an increased number of cotton producers, resulting in a significant expansion in cotton area. Currently, 160,000 families or production units produce cotton nationwide, up from 140,000 in 1987/88.

WHEAT

The 1990/91 wheat crop, reduced by extreme temperatures and frost, is estimated at 300,000 tons, down from 375,000 last year. In 1989/90 wheat production reached record levels. Because the 1989/90 soybean crop suffered significant yield reductions due to weather, producers hoped to regain their losses by increasing export revenue with 1990/91 wheat production. However, producers are currently facing serious financial difficulties due to excessively cold temperatures during the months of July and September, which devastated this year's wheat crop. During the 1990/91 season, 60 to 70 percent of the crop was "feed quality".

The hot and humid Paraguayan climate is not well suited to wheat production which requires cool, non-humid conditions to inhibit disease. Even during a good year, yields and quality are poor. One hundred percent of the wheat grown in Paraguay is double-cropped with soybeans by medium and large scale soybean farmers who use highly mechanized cultivation practices. These farmers produce wheat as a means of generating off-season income and buffering the fixed costs associated with soybean production. Wheat is planted beginning in May after the soybean crop has been harvested. The wheat harvest extends from October through December.

MINOR CROPS

Over 90 percent of Paraguayan corn production is in the region east of the Paraguay river. Corn is a non-commercial crop which is generally consumed on-farm as both human food and livestock feed. It can be planted within a wide planting window from July through February. Fertilizers and pesticides are rarely used. Corn is considered a secondary crop, since producers usually double-crop corn with cash crops, such as soybeans or cotton. Consequently, corn is often planted late. This late planting, combined with low input use, seriously limits yield potential. Roughly 80 percent of the crop is produced by subsistence farmers on small tracts of land, however, a few agro-industries are involved in corn production, particularly in the poultry sector.

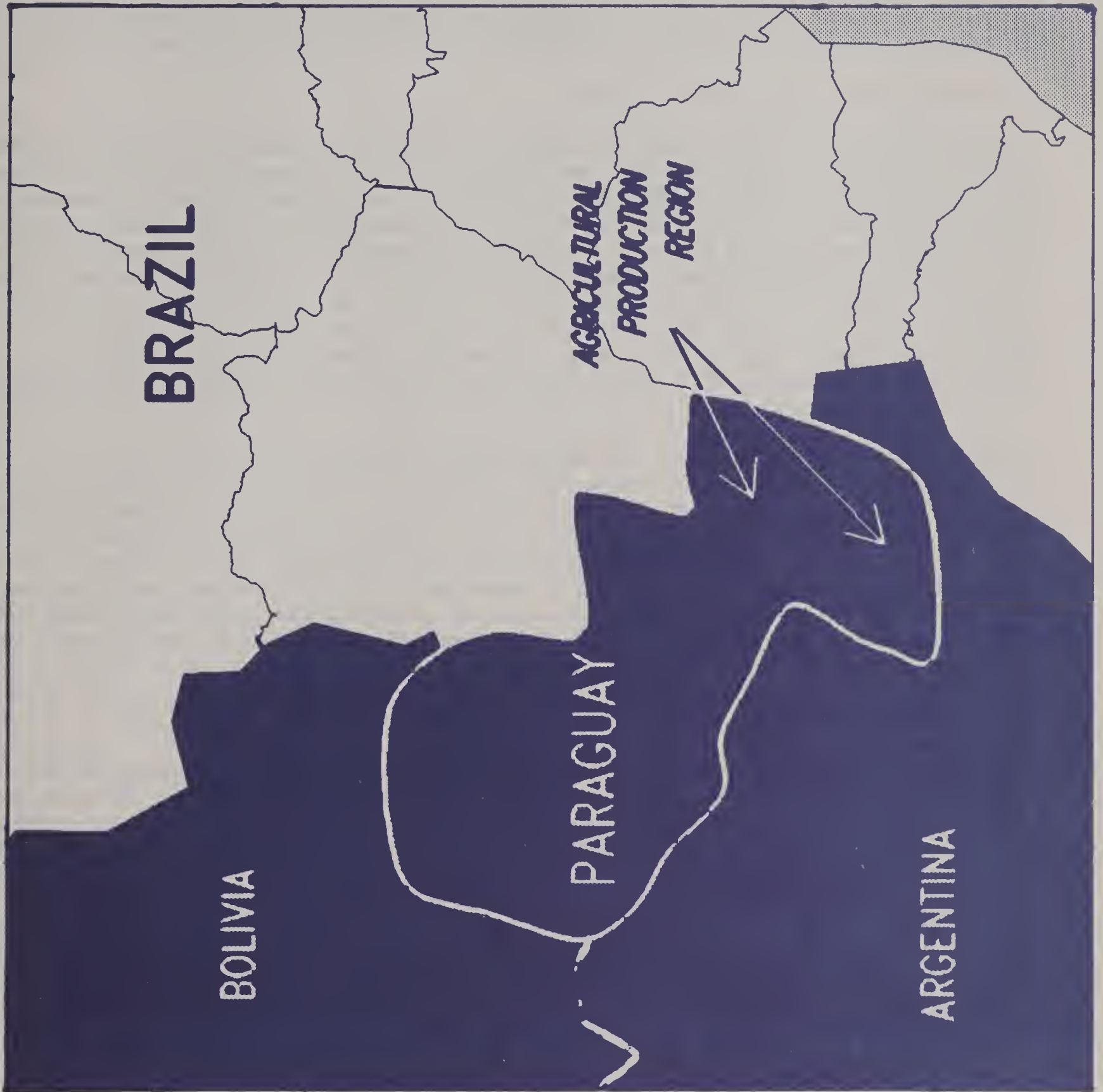
Nearly 55 percent of Paraguay's peanut crop is produced by Mennonites in the Chaco region west of the Paraguay river. Production has remained fairly stable over the last ten years. Peanuts are produced for export as well as local use. Broken peanuts are crushed domestically. Better quality peanuts are exported for processing or confectionery use.

TABLE 20

Paraguayan Grains, Oilseeds, and Cotton

	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92f
<i>AREA HARVESTED (1,000 hectares)</i>												
SOYBEANS	400	420	350	420	550	550	530	615	850	980	890	N/A
COTTONSEED	290	270	240	300	400	330	275	420	438	509	550	N/A
PEANUT	25	37	37	37	39	40	32	28	41	38	39	N/A
COTTON	290	270	240	300	400	330	275	420	438	509	550	N/A
CORN	377	400	350	370	400	350	400	547	420	480	490	490
WHEAT	42	50	70	106	97	127	154	175	195	235	240	230
<i>YIELD (metric tons per hectare)</i>												
SOYBEANS	1.50	1.43	1.49	1.31	1.73	1.09	1.79	1.79	1.90	1.61	1.47	N/A
COTTONSEED	0.66	0.60	0.59	0.60	0.68	0.60	0.55	0.73	0.82	0.75	0.67	N/A
PEANUT	1.00	0.97	1.00	1.00	1.08	1.00	1.25	1.25	0.61	1.08	0.90	N/A
COTTON	0.36	0.33	0.33	0.33	0.40	0.32	0.31	0.49	0.50	0.44	0.40	N/A
CORN	1.50	1.34	1.33	1.14	1.13	1.00	1.33	1.28	1.33	1.46	1.31	1.33
WHEAT	1.10	1.08	1.00	1.32	1.90	1.46	1.52	1.54	1.60	1.60	1.25	1.50
<i>PRODUCTION (1,000 metric tons)</i>												
SOYBEAN	600	600	520	550	950	600	950	1100	1615	1575	1300	N/A
COTTONSEED	190	175	141	180	270	196	150	305	360	380	370	N/A
PEANUT	25	36	37	37	42	40	40	35	25	41	35	N/A
COTTON	105	90	80	100	160	105	84	205	220	225	218	N/A
CORN	550	550	465	420	450	350	530	700	560	700	640	650
WHEAT	46	54	70	140	184	185	234	270	312	375	300	345

Paraguayan Production
Region



MAP 2

SOVIET GRAIN CONDITIONS

Personnel from the USDA's Foreign Agricultural Service traveled through the winter grain region of the Soviet Union from May 15 through May 28, 1991. The 5,000 kilometer automobile trip took travelers through Moscow, Kiev, Odessa, Dnepropetrovsk, Rostov, Krasnodar, Pyatigorsk, Volgograd, and Voronezh. Meetings were held with local agricultural officials in Cherkassy oblast, Dnepropetrovsk oblast, and Krasnodar Kray. The main purpose of the trip was to determine the condition and growth stages of winter grains. The crop was in good-to-excellent condition throughout the area, confirming projections by the USDA of a better-than-usual winter grains crop this year and supporting the USDA June 1991/92 total grain production estimate of 210 million tons.

CROP CONDITIONS AND GROWTH STAGES

The condition of both winter and spring grains was very good. Stands appeared to be excellent. Soil moisture was adequate but not excessive. Winter wheat was in the boot stage in the southern Central Region and in the northern and central Ukraine. Winter wheat was in the heading stage in southwest Ukraine and the southern North Caucasus. Winter rye was in the heading stage in the Central Black Earth Region. Spring barley fields had recently emerged and were in good condition in the southern Central Region and northern and central Ukraine. Spring barley fields were noticeably more advanced in southern Ukraine; the crop was in the early boot stage. Emerging stands of corn, sugarbeets, and sunflowers appeared to be in very good condition at this early stage.

Weed infestation in small grain fields appeared to be regional in nature. In the central and southern Ukraine, for example, weed infestation was a problem in a considerable number of winter grain fields. Cherkassy and Dnepropetrovsk Oblast agricultural officials remarked that obtaining pesticides has been a problem this year. Weed infestation was limited to only some fields, however, many fields were weed-free. Weed infestation was not observed to be a problem in the North Caucasus Region. Considerable lodging was observed in winter wheat fields in northern Krasnodar Kray, but officials in Krasnodar said that lodging this year is no worse than usual.

HIGHLIGHTS OF MEETINGS WITH LOCAL OFFICIALS

AGROPROM officials and farm directors in Cherkassy oblast, Dnepropetrovsk oblast, and Krasnodar Kray all stated that the 1991 winter wheat area is about the same as last year. No problems were encountered in planting last fall's winter grain crop. (This is as had been expected; problems with winter grain planting occurred farther north, in the winter rye region.) Winter wheat yield projections offered by Soviet agricultural officials seemed overly conservative. Despite excellent overall conditions and winterkill estimated at only 2 percent this year, Krasnodar Kray officials stated that they expect 1991 winter wheat yields to drop about 20 percent from last year's level. Winter wheat yields in Dnepropetrovsk Oblast were estimated by officials to be 15 percent below last year.

Officials indicated that plant protection agents are in short supply in both Cherkassy and Dnepropetrovsk oblasts. Officials said that in previous years 80 percent of plant-protection agents were imported, but this year there is no hard currency available for the purchase of chemicals. Domestically-produced materials are of poor quality. Officials in Krasnodar Kray said supplies of plant protection agents are adequate, and consider their major problem to be a lack of grain storage facilities.

Officials in Dnepropetrovsk Oblast said that the oblast does not produce enough food for its population. This is an industrial region and industrial products are routinely exchanged for food. Grain production is not a problem. Their goal is to boost dairy yields by increasing forage production and the amount of protein in the compound feed.

Spare parts shortages were discussed with officials in Cherkassy oblast. Officials indicated that spare parts availability continued to be a problem. The method of procuring parts has changed due to the advent of market reforms. In the past, the state had the responsibility of providing farms with the spare parts that they needed; farms now make arrangements directly with the factories which manufacture parts. Parts have been manufactured and are available, according to the machinery official, but the procurement process is more difficult.

Cherkassy officials estimated that harvest losses of grains regularly run about 10 percent, due primarily to inefficient machinery. They would like to purchase U.S. equipment, but were frustrated by the fact that while trade between the two countries is beginning to expand, there is no hard currency available with which to purchase U.S. machinery.

CORN FOR GRAIN

The Dnepr Corn Production Institute located in Dnepropetrovsk was visited. The institute was established sixty years ago and employs 6,000 people at eleven experimental stations in the Ukraine and the RSFSR. The institute has three main functions: development of new corn hybrids; development of technology; and production of seed for corn, small grains, and pulses. Since one of the greatest problems involved with corn-for-grain production is the short growing season, researchers are currently working on shorter-season grain corn varieties. Ninety-day hybrids are currently available, and the goal is to develop an eighty-five day variety. The director of the institute stated that the potential area suitable for corn-for-grain production is six million hectares. Another important focus of research at the institute is more efficient use of herbicides. While the need for herbicides is recognized, researchers feel that improvements can be made in methods of application. Many of the regularly-used herbicides are manufactured in the West, particularly in the United States, and researchers at the institute are currently involved in joint research with several U.S. chemical companies.

Officials at other locations in the Ukraine and North Caucasus made interesting and surprising comments regarding corn-for-grain area. Corn-for-grain area in the Soviet Union has traditionally comprised about 20 percent of total corn area at the national level, with the remaining 80 percent harvested as silage or green chop. Corn-for-grain area in Cherkassy oblast, Dnepropetrovsk oblast, and Krasnodar Kray, however, constitutes between 35 and 50 percent of total corn area. Dnepropetrovsk oblast officials stated that inadequate precipitation prevents greater production of corn for grain. Officials at all three locations said that corn-for-grain area "balances" winter wheat area. If area sown to winter wheat is decreased, for example, area planted in corn for grain the following spring is increased. At the national level there is no clear relationship between winter wheat and corn; the area sown to spring barley generally has been inversely related to winter wheat area.

USSR: HARVESTED AREA OF SELECTED GRAINS

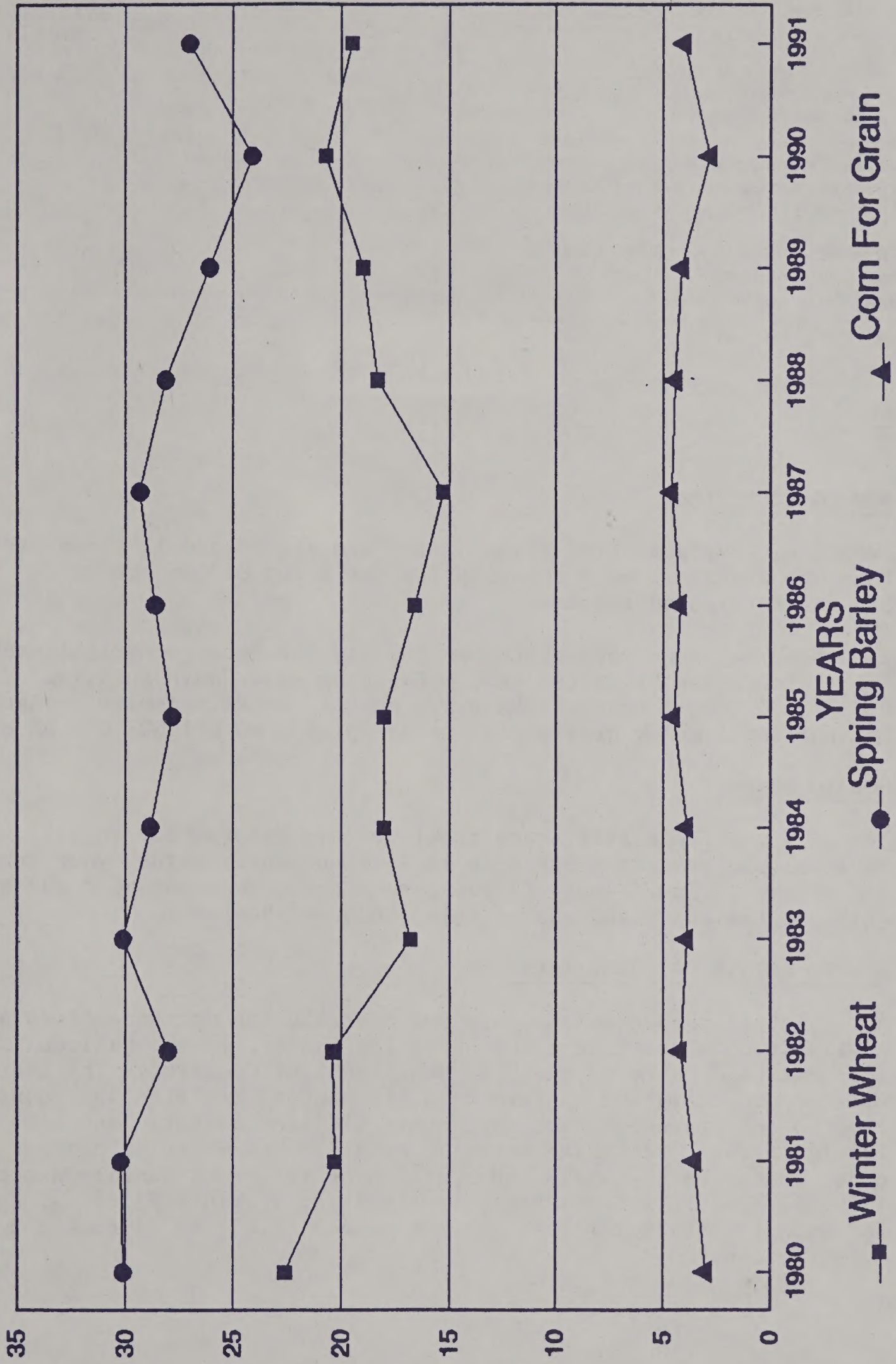
Year	Winter Wheat	Corn for Grain	Spring Barley
----	-----	Million Hectares	-----
1980	22.6	3.0	30.1
1981	20.3	3.5	30.2
1982	20.4	4.2	28.0
1983	16.8	3.9	30.1
1984	18.0	3.9	28.8
1985	18.0	4.5	27.8
1986	16.6	4.2	28.6
1987	15.3	4.6	29.3
1988	18.3	4.4	28.1
1989	19.0	4.1	26.1
1990	20.7	2.8	24.1

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CHART 1

SOVIET GRAIN AREA

MILLION
HECTARES



June 1991

Production Estimates & Crop Assessment Division, FAS, USDA

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